



Powhatan County

Economic Development Strategic Plan

Presented by:

Bowman
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Spectrum Growth Solutions

Powhatan County Economic Development Strategic Plan

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Section 1: Community Background

The County of Powhatan is a community of 28,000 residents, located on the western edge of the Richmond Metropolitan Area, approximately 20 miles west of the City of Richmond, Virginia, the State Capitol. The County borders Goochland County and the James River to the north, Chesterfield County to the east, Amelia County and the Appomattox River to the south, and Cumberland County to the west.

The County has easy access to major transportation corridors with Interstate 64, a primary east-west highway within eight miles of the County. Route 288, the western by-pass around Richmond connecting Interstate 64 and Interstate 95, is located along the County's northeastern corporate limits with both State Routes 60 and 711 providing access to Powhatan from Route 288. Richmond International Airport is located 40 miles from the County.

Although predominately rural in character, Powhatan has experienced significant residential growth in recent years as the Richmond area migrated westward. The County's population increased 25% between the 2000 and 2010 Census. As one of the fastest growing communities in the Commonwealth, the County is committed to preserving its rural charm while accommodating residential and business growth. To support this goal, the County adopted an update to the Comprehensive Land Use Plan in July 2010. Additionally, County leaders are currently working on a Countywide Strategic Plan that will be based on the Vision 2030 statement adopted by the Powhatan County Board of Supervisors in July 2014. In the interim, the County issued a Request for Proposal (RFP) in October 2014 for preparation of an Economic Development Strategic Plan to assist the community in identifying opportunities for diversification and expansion of the County's tax base, and creation of additional employment opportunities for local residents.

Section 2: Purpose of the Plan

In July 2014, the Powhatan County Board of Supervisors defined their 2030 Vision for the community, including a commitment to an "attainable quality of life" and "rural character" for its residents. This Vision was reinforced by the Board's adoption of broad goals that outlined seven primary areas of focus, including development of a "strong, robust, and diverse economy." In addition, the Board stated their intentions to provide for quality education, local and regional partnerships, and infrastructure needed for a "sustainable community" – all of which are critical components of successful economic development programs. Thus, these and other elements of the 2030 Vision provide the foundation on which the Economic Development Strategic Plan ("the Plan") for Powhatan County has been developed.

As with any guiding document, the Economic Development Strategic Plan is intended to be a "roadmap" for delineating ways Powhatan County can arrive at its goal for a strong economy. Specifically, the Plan identifies ways in which the County can strengthen its business tax base and employment opportunities, through establishment of new programs, revisions to policies

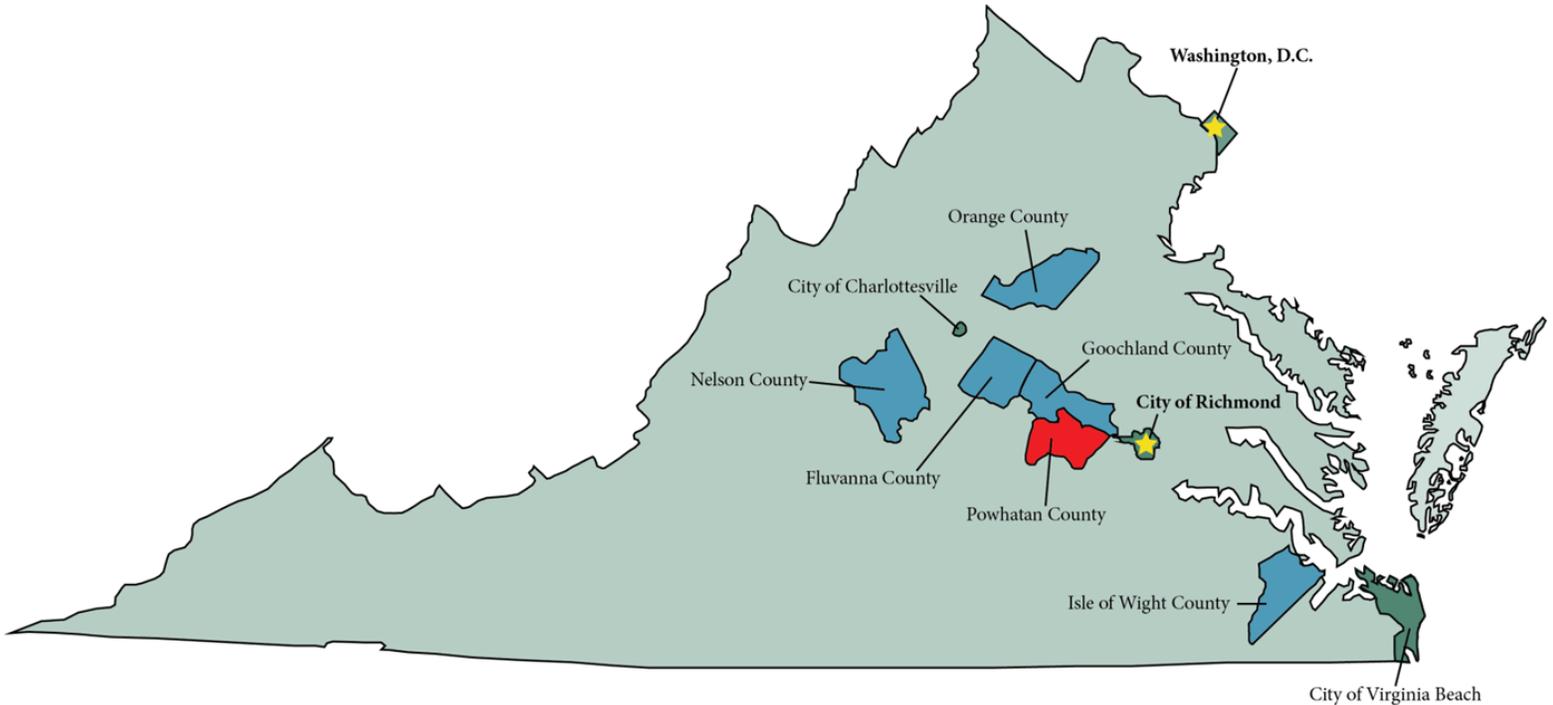
and regulations, or other modifications. Furthermore, by establishing key goals, objectives, strategies, and associated metrics, County leaders can better define their priorities, as well as monitor the effectiveness and success of economic development initiatives. Likewise, measurable goals and objectives will help to identify where program modifications or enhancements to strategies are needed, particularly in light of continual market changes; thus, County staff and the consultant team worked jointly to define specific goals and objectives as part of this document (refer to *Section 5: Goals, Objectives, & Performance Measures* on page 51).

Section 3: Project Approach & Methodology

Spectrum Growth Solutions LLC and **Bowman Consulting** partnered on this project to offer a comprehensive team of professionals to deliver all components of the Economic Development Strategic Plan. While each company operates independently, the work was completed collaboratively and cooperatively to provide the services and approach defined under the unified banner of **Spectrum Growth Solutions LLC**. Subsequently, the Spectrum team included proven professionals with expertise in economic development, land development, infrastructure design, engineering, planning, tourism, agribusiness, economic analysis and research, and public finance.

The methodology used in formulation of the Economic Development Strategic Plan was a multi-step process that included both objective and subjective evaluation (*Figure 2: Scope of Work and Project Approach*). Significant data analysis was also completed to derive the current “starting point” for Powhatan County. Next, key data sets such as population growth, labor force, education levels, skill sets, employment/industry composition, wage rates, costs of living, tax structures, and utility rates for Powhatan were compared to those of similar communities to better understand the County’s competitive position. While the study initially included review of data for ten similar communities around Virginia (Bedford County, Charles City County, Fauquier County, Fluvanna County, Goochland County, Isle of Wight County, Mecklenburg County, Nelson County, Orange County, and Southampton County), an in-depth analysis was completed for the “top five” localities – Fluvanna, Goochland, Nelson, Isle of Wight, and Orange County – based on their comparative strengths to Powhatan’s (e.g. proximity to a MSA, population, transportation, industry sectors, rural composition). Subsequently, these five communities serve as “benchmarks” in the detailed Comparative Analysis provided in *Appendix A*.

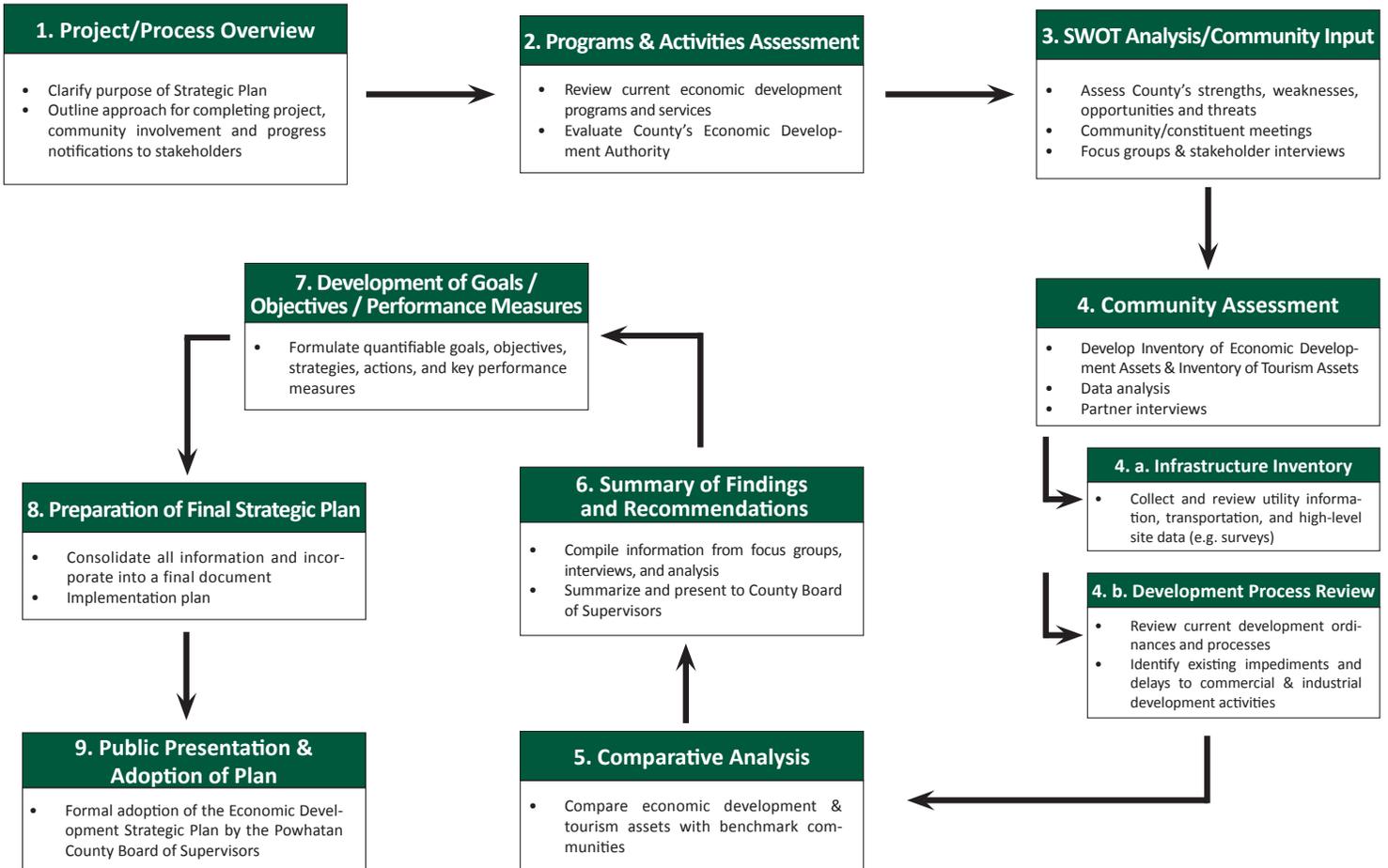
Figure 1: Virginia Benchmark Communities



The objective analysis was also accompanied by technical evaluation of current infrastructure availability and capacity within the County, as outlined in *Section 4.C. Infrastructure*. Subjective assessment included review of the County’s current development policies and regulations, as well as consideration of valuable feedback gathered from community stakeholders through personal interviews, focus groups, and public input meetings. A compilation of all the objective and subjective components factoring into the Plan have been included in the Appendices provided in this document.

A detailed discussion of the comprehensive analysis undertaken for each area (economic development, agribusiness and tourism, infrastructure, and development process review) follows below, along with recommendations for advancing the County’s Economic Development efforts.

Figure 2: Scope of Work and Project Approach



Section 4: Discussion of Findings & Recommendations

A. Economic Development

Economic Development is a critical component of any healthy community, as it involves the creation of job opportunities and strengthening of the non-residential tax base through attraction and growth of local businesses. While the nature and intensity of economic development activities can vary widely from one place to another, every locality requires some level of sustainable business growth to help cover the cost of providing basic services – schools, public safety, fire and rescue, social services – to its residents. Subsequently, communities must define the degree and nature of business activities that it is able and willing to support and prepare accordingly; otherwise, the market will eventually do it for them.

While Powhatan's economic activity has not been as robust as some of its neighbors, it offers a number of key assets that can enhance the County's long-term prospects for business growth,

providing for a more sustainable and balanced economy in the years ahead. More importantly, the County's Economic Development Strategy must be aligned with community assets and, where feasible, define a path for overcoming challenges to ensure its success.

An in-depth review of relevant data, to determine Powhatan's competitive position in relation to the five peer communities cited earlier, reveals the following:

Key Findings: Economic Development

- 1) Powhatan is well-positioned to capitalize on its proximity to the Richmond MSA; thus, Powhatan needs to seize this opportunity before neighboring Goochland does so through enhanced and focused Economic Development programs and initiatives.
- 2) Population growth in Powhatan has been strong, growing by more than 28% in the past 15 years.
- 3) Powhatan continues to attract new residents, with a healthy percentage (6.6%) of them moving from other Virginia communities.
- 4) The County's median age is 42.6 years, with the majority of residents falling between the ages of 45 and 64; however, the number of school age residents and older adults (65+) is almost the same, impacting Powhatan's labor force participation rate (58.2%) which is much lower than the regional average of 67.1%.
- 5) The median value of homes in Powhatan in 2013 was about \$270,000 (same as in Goochland), but much higher than in Fluvanna, Nelson and Orange.
- 6) The low percentage of 2-or-more-unit structures in Powhatan (1.9%), compared to the benchmark localities, points to a limited number of affordable housing units in the community.
- 7) The median household income in Powhatan (\$76,548) is just behind Goochland (\$80,976); however, retail and entertainment establishments are extremely limited in Powhatan. Subsequently, neighboring localities are the beneficiaries of discretionary spending by Powhatan residents, and the associated sales tax revenue.
- 8) The unemployment rate in Powhatan (avg 4.5% in 2014) has been below the regional average and is lower than all comparable communities except Fluvanna (4.3%). During the last 12 months, it has ranged between 4.0-4.9%; however, Powhatan has a large number of underemployed individuals – about 12% of its labor force.
- 9) Powhatan offers a talented and well-educated workforce. A substantial portion (85.9%) of adults 25 and older in Powhatan County have at least a high school diploma, and almost 28% have a Bachelor's degree or higher. Additionally, more than 60% of local workers have more than 10 years of experience.
- 10) Public Administration is the leading employment sector in Powhatan, with nearly 1,600 workers (likely at the State Corrections Facility located in the County). Construction is a close second (1,233), also leading the way in the number of establishments (199). Educational Services (737), Retail Trade (604), Accommodation and Food Services (438) complete the "Top Five."
- 11) Higher-paying industries such as Professional, Scientific, and Technical Services, Manufacturing, and Information make up smaller percentages of total employment.

- 12) At-place employment opportunities for Powhatan residents are limited, so nearly 70% of County residents out-commute daily.
- 13) The region's four universities – Virginia Commonwealth University, Virginia Union University, University of Richmond, and Virginia State University – and two community colleges (John Tyler and J. Sargeant Reynolds) can provide a significant pipeline of workers, as well as training programs for local employers.
- 14) Total employment in Powhatan County is approximately 8,000, distributed across 727 businesses.
- 15) The Construction sector has the most establishments (199); other leading sectors include Professional, Scientific, and Technical Services (PSTS) and Health Care and Social Assistance.
- 16) Powhatan's industry composition is also driven by small businesses, with the majority of companies comprised of four employees or less.
- 17) Powhatan is home to four government employers – Virginia Department of Juvenile Justice, Powhatan Correctional Center, Deep Meadow Correctional Center, and Powhatan Reception and Classification Center – making it especially vulnerable to impacts of State budget cuts.
- 18) Construction is the dominant private sector activity in Powhatan by number of establishments (199 / 27.4%) and employment (15% / 1,233).
- 19) The Professional, Scientific & Technical Services (PSTS) sector is Powhatan's third largest by number of establishments (88 / 12), yet it only makes up 5% of the County's employment base.
- 20) The Health Care and Social Assistance (HCSA) sector is prominent in Powhatan, making up nearly 11% of the total number of establishments; however, employment levels in this sector are lower than in comparable localities.
- 21) The Agriculture, Forestry, Fishing and Hunting industry is not well-represented in Powhatan, particularly considering the rural nature and land mass available in the County.
- 22) Data suggests that Powhatan is more of a rural community rather than agricultural – an important distinction – as can also be said for Goochland and Fluvanna.
- 23) Twenty-two small establishments, representing about 3.0% of all companies in the County, comprise Powhatan's Manufacturing industry. While similar in number to the comparative localities, manufacturing employment levels in the other areas are significantly higher than in Powhatan. In fact, manufacturing employment in the County is below the Virginia average.
- 24) The average weekly wage for 'All Industries' in Powhatan in the 3rd Quarter 2014 was just over \$800, below that of neighboring Goochland, but higher than all other comparative communities.
- 25) Labor costs for manufacturing operations are also more affordable in Powhatan, as weekly wage levels (\$806) are not only lower than in Goochland (\$1,191) but also lower than in Fluvanna (\$858). Powhatan wages for the Manufacturing sector are also significantly lower than the average for the Richmond MSA (\$1,031).
- 26) Powhatan County's nominal real estate tax rate (\$0.90) is the highest of the five benchmark communities.

- 27) Stakeholder feedback noted the level of services provided in Powhatan are not in keeping with the tax rate – particularly when compared to other localities in the Richmond MSA, especially Goochland (\$0.53) and Henrico (\$0.87).
- 28) Powhatan County’s nominal M&T tax rate (\$3.60) is the highest of all eleven communities studied and, despite a seemingly aggressive assessment schedule, the County’s effective rate remains among the top three highest of all the comparative localities.
- 29) While Powhatan’s nominal Business Tangible Personal Property tax rate (\$3.60) is the median of all communities studied, the effective rates show the County is more competitive here than it is for either Real Estate or M&T taxes.
- 30) At an average of \$9.12/sf, lease rates in Powhatan are on par with Goochland, yet higher than all the comparable communities except Nelson County.
- 31) Powhatan has over 37% more existing space than Goochland, but vacancy rates are much higher (13.1% versus 10.3%).
- 32) Median land prices in Powhatan are significantly higher than two of the comparative localities (Orange and Isle of Wight) yet only about 11% higher than in nearby Goochland. This is likely attributable to the County’s restrictive development policies, proffers policy, and limited utility infrastructure – creating a typical “supply and demand” scenario.
- 33) Base fees (connection/availability fees) for water in Powhatan are not significantly different than in other areas, but the County’s sewer facility fee is more than twice the cost of several comparative communities.
- 34) Both sewer and water utilization rates are lower in Powhatan than in four of the five comparison communities.
- 35) Powhatan’s current residential to commercial/industrial tax base is approximately 85%/7% -- significantly less than the “gold standard” 70%/30% ratio – placing a significantly disproportionate share of the tax burden on residential taxpayers.
- 36) Limited economic, workforce, and other statistical data is available on the County website – the primary source of information for companies and site location consultants.
- 37) The Powhatan Economic Development Authority and its available powers have been substantially underutilized, rather than an integral component of the County’s Economic Development efforts.
- 38) The County’s existing businesses lack a designated point of contact to help facilitate solutions to their concerns. There is also no formal, ongoing Business Retention and Expansion (BRE) program to gather regular feedback and identify companies at risk of closing or relocating.

Although Powhatan’s organizational structure has previously included a formal, independent Economic Development Office, the current structure assigns responsibility for Economic Development activities to the Deputy County Administrator, also responsible for oversight of Community Development and other County functions. As such, many of the best practices commonly found in other Economic Development programs are not being utilized due to the many and varied competing demands for the Deputy’s time. Some of these components –

Business Retention and Expansion (BRE), Incentive Programs and Policies, creation of Technology Zones, and Economic Development Authority activities – should be readily addressed as discussed below.

A. 1. Business Retention and Expansion

Business Retention and Expansion (BRE) programs, sometimes referred to as “business visitation,” are a critical component of Economic Development efforts, as they provide a formal mechanism for staying in touch with local businesses. This, in turn, allows the locality to better address challenges and concerns that may be hindering a company’s operations or growth plans, potentially in time to avert the company’s possible relocation to or expansion in another community. Likewise, BRE programs that offer a designated point of contact for and regular dialogue with local businesses help to foster relationships with company leaders that can often prove useful in the locality’s business recruitment efforts, as many of these businesses are willing to share their positive experiences in the community with other business leaders, prospective companies, suppliers, etc. As such, these satisfied business contacts can become valuable “ambassadors” for the County and, ultimately, one of the most effective tools for attracting new businesses to the area.

*Business Retention and
Expansion programs are a
critical component of Economic
Development efforts.*

While the structure of BRE programs can vary, they frequently include the following initiatives, either in their entirety or in some combination:

- a) Personal, face-to-face interviews conducted by Economic Development staff with local business owners/company officials to obtain key business intelligence as solicited through a pre-defined, standardized survey or questionnaire. Interviews can also be conducted by trusted partners, such as select local Chamber of Commerce members or representatives from the Economic Development Authority that have been appropriately trained to implement the survey tool.
- b) Industry-specific quarterly “roundtables” with representatives from the County’s primary business sectors that offer a speaker program and/or facilitated discussions on topics relevant to that industry (e.g. new state/federal regulations, workforce development programs, financing, lean manufacturing).
- c) Workplace Education Events in concert with local employers and schools that feature tours of area facilities for students and local educators to provide exposure to job/career opportunities and skills needed in the workplace.
- d) Annual Business Appreciation event, usually held during Virginia’s Business Appreciation Week, to formally thank area companies for their contributions to the local community. Events may include an after-hours reception, luncheon, picnic, or other opportunity for networking between local business leaders and local government officials.

A. 2. Incentive Programs and Policies *(Note: At the time of this study, there was no record of Powhatan having any formalized Incentives Program or related policy in place.)*

While sometimes considered a “necessary evil,” localities serious about enhancing their Economic Development opportunities have recognized incentive programs as an integral component. In fact, during the course of most Economic Development projects, the incentives topic is sure to come up for discussion with company officials (or their consultant), so it’s best to be well-prepared to respond based on a consistent adopted policy.

Although direct financial incentives are the most common – cash grants, tax waivers/abatements, low-interest loans, free or discounted land (if owned by the locality) or free rent/lease payments made by the locality on the company’s behalf – incentives can also take other forms such as infrastructure improvements, expedited development review and permitting, or cost-avoidance offerings (e.g. sales tax exemption). Subsequently, a “one size fits all” approach is not recommended. More importantly, some general guidelines should be incorporated into a well-documented policy addressing discretionary incentives:

- Make sure the company is well-established, credible, and financially stable;
- Determine if the business is part of an industry sector being targeted by the County;
- Establish minimum job creation, wage levels, and/or capital investment thresholds by which a business will qualify for incentives (e.g. at least 10 new jobs; average wage of \$20 per hour; capital investment from land/building/equipment of at least \$5 million). These thresholds may be adjusted (or separately defined) for new companies versus existing businesses that may be expanding but, in general, wage requirements should be tied to the County’s “prevailing average wage” as reported quarterly by the VEC to ensure quality employment opportunities in the community;
- Calculate the projected Return on Investment (ROI) – i.e. direct tax revenue – the County can expect to receive from the company’s expenditure on taxable assets (capital investment – i.e. land, building, equipment) over a three to five year period to ensure the value of incentives can be recouped through the taxes collected from the company during that timeframe. (Note: A three-year “repayment” period is typically what the Commonwealth of Virginia requires for projects receiving cash grants from the Commonwealth Opportunity Fund; however, the term may be extended to four or five years for projects with significant capital investment or a “ramp up” period for employment.);
- Performance Agreements, outlining the commitments of both the locality and the company, should always be used when cash grants are awarded. In addition, the Agreement should include a “clawback” provision that defines the company’s requirement to repay the grant in the event it fails to meet the job creation and/or capital investment threshold on which the grant was made;
- Financial incentives (particularly cash grants) should be considered “deal closing” funds and, therefore, used judiciously for economic development projects meeting

- the County's primary goals for expanding the non-residential tax base and creation of basic sector, sustainable job opportunities;
- Statutory incentive programs such as Enterprise, Technology, and Tourism Zones should be simple to access, predictable, and easily quantified for the company. Unlike discretionary incentives that are granted by the locality based on direct negotiation/discussion with the recipient business and approved by the governing body, statutory incentive programs are generally triggered by a company's location within a defined geographic boundary (e.g. Technology Zone), as long as the qualifying criteria for the incentives – usually very straightforward and achievable – are met. For this reason, statutory incentive programs are often very effective in stimulating business growth in a designated area (e.g. business park), attracting targeted business sectors, easier to implement, and accessible to a wider array of businesses. Additional discussion of Technology Zones is provided below.
 - Virginia law prohibits local governments from directly awarding cash grants to a private business entity; therefore, discretionary cash incentives are typically provided to the qualifying company through a separate political subdivision, such as the local Economic Development Authority, or other public body that has the necessary powers to offer the grant on behalf of the locality. Subsequently, communities that are engaged in and well-prepared for economic development activities will also ensure an Economic Development Authority is in place to administer the incentive program adopted by the local governing body. Economic Development Authorities are discussed in more detail later in this document.

A. 3. Technology Zones

In 1996, the Virginia General Assembly authorized the creation of Technology Zones to provide another valuable tool for encouraging new and expanding technology businesses to locate in Virginia. Specifically, § 58.1-3850 allows any city, county or town to establish, by ordinance, one or more technology zones which enable the locality to grant tax incentives and provide certain regulatory flexibility in designated areas, particularly for targeted industry sectors the community is trying to attract. While the Virginia Enterprise Zone Program provides for many of the same things, the Technology Zone legislation allows communities ineligible for Enterprise Zone designations to mimic those programs locally, in an effort to remain competitive.

Unlike the Virginia Enterprise Zone Program that provides for both state and local benefits, Technology Zone benefits are offered solely by the city, county or town designating the Zone. Likewise, eligible businesses, qualifying criteria, and physical location of the Zone are determined directly by the locality, giving it the ability to broadly define the parameters on which benefits are bestowed; however, the State Code specifically outlines the following provisions and limitations for the Program:

- The tax incentives may be provided for up to ten years and may include, but not be limited to: (i) reduction of permit fees; (ii) reduction of user fees; and (iii) reduction of any type of gross receipts tax. The extent and duration of such incentive proposals

shall conform to the requirements of the Constitutions of Virginia and of the United States.

- The governing body may also provide for regulatory flexibility in the Zone which may include, but not be limited to: (i) special zoning for the district; (ii) permit process reform; (iii) exemption from ordinances; and (iv) any other incentive adopted by ordinance, which shall be binding upon the locality for a period of up to ten years.

As of September 2015, Technology Zones have been established in 39 Virginia localities*, although the way in which benefits are granted varies – including whether they are deemed statutory or discretionary. Though many local governing bodies prefer to administer Technology Zone benefits on a discretionary basis, the State’s enabling legislation facilitates a simpler, statutory approach – one that is also more attractive to businesses. Thus, the most successful and utilized Technology Zone programs can be found in those communities administering them in a way that: (1) allows for the value of any zone benefits to be defined and quantified before location/expansion decisions are made; (2) minimizes public/political approvals, which can compromise the company’s confidentiality; (3) facilitates and simplifies access to the benefits by qualifying companies; (4) allows for clear and straightforward implementation of the program by County staff; (5) encourages investment/development activity in targeted areas of the County and by defined business sectors. For example, five years of Machinery & Tools Tax rebates and water/wastewater connection fees may be available to manufacturing companies locating in one of the County’s business parks along Route 60 whereas, in areas near the Courthouse (where more service businesses are desired), development fees may be waived and a 100% rebate on Business Tangible Personal Property Tax may be offered for the company’s first year in business (assuming it meets qualifying investment criteria).

As noted earlier, since each locality designs and administers its own Technology Zone program, the physical boundaries and related provisions of the program allow for great flexibility; however, in order to maximize the potential for expansion of its business base given all pertinent location factors, Powhatan leaders may want to consider establishment of Technology Zones in those areas with the lowest development hurdles. Accordingly, the County-designated Urban Development Areas (UDA) which, intrinsically, include pre-existing utility and transportation networks, provide logical starting points for establishment of a Technology Zone. This is particularly true for the easternmost portion of the Route 60 Corridor East UDA where utilities are generally available and compatible development already exists (i.e. Oak Bridge Business Park). Please refer to *Figure 3: Powhatan County Utilities Map* on page 36 for additional information.

* A complete list of local Technology Zones in place around Virginia can be found at this website address: <http://www.virginiaallies.org/assets/files/incentives/techzonewriteup.pdf>

A.4. Economic Development Authorities

The Commonwealth of Virginia first enacted the Industrial Development and Revenue Bond Act more than 60 years ago, authorizing the creation of Industrial Development Authorities by localities in the Commonwealth. The primary purpose of this legislation was to enable local

Economic Development Authorities can be a valuable tool in advancing the locality's Economic Development goals.

governments to assist in promoting industry and developing trade throughout the Commonwealth for the benefit of its residents. Over the years, the Statute has undergone some minor revisions, including allowing for changing of the name from Industrial Development Authority (IDA) to Economic Development Authority (EDA) in localities where activities extend beyond those involving traditional

manufacturing businesses. Nevertheless, § 15.2-4901 of the Code of Virginia clearly defines the purpose and powers of these political subdivisions, and outlines the many ways in which EDA's and IDA's can be a valuable "tool" in advancing the locality's (and the Commonwealth's) Economic Development goals.

The Statute also outlines specific and purposeful powers for authorities that, in many instances, are not available to the locality itself in order to increase commerce or to promote safety, health, welfare, convenience or prosperity around Virginia. The explicit Authority powers include:

- Acquisition, ownership, leasing, and disposal of properties and making loans to precipitate these actions;
- Inducing manufacturing, industrial, governmental, nonprofit and commercial enterprises and institutions of higher education to locate or remain in the Commonwealth;
- Developing, constructing or financing pollution control facilities;
- Assisting in the acquisition, construction, equipping, expansion, enlargement and improvement of:
 - Medical facilities and facilities for the residence or care of the aged – including recreational, activity centers, and other facilities for use by the inhabitants – or refinancing of these facilities owned and operated by organizations which are exempt from taxation pursuant to § 501(c)(3);
 - Private, accredited and nonprofit institutions of collegiate education in the Commonwealth whose primary purpose is to provide collegiate or graduate education (not to provide religious training or theological education);
 - Facilities for museums and historical education, demonstration and interpretation, together with any and all buildings, structures or other facilities for use by nonprofit organizations in order to promote tourism and economic development in the Commonwealth;
 - Facilities for a locality, the Commonwealth and its agencies, and governmental and nonprofit organizations;

- Facilities devoted to the staging of equine events and activities (other than racing) for use by governmental or nonprofit, nonreligious organizations and operated by such governmental or nonprofit, nonreligious organizations;
- Facilities used primarily for single or multi-family residences in order to promote safe and affordable housing in the Commonwealth (only where housing authorities have not been activated as provided by §§ 36-4 and 36-4.1);
- Acquiring, developing, owning and operating an industrial park and any utilities that are intended primarily to serve the park and to issue bonds for such purposes. The bonds may be secured by revenues generated by the industrial park or the utilities being financed or by any other funds of the authority.

Section 2.2-2285 of the Code of Virginia also defines additional powers of the Authority that include:

- Borrowing money and issuing bonds;
- Receiving and accepting, from any source, aid or contributions of money, property, labor, or other things of value to be held, used, and applied to carry out its purpose;
- Entering into agreements with any department, agency or instrumentality of the United States or the Commonwealth;
- Entering into agreements with lenders or contracting with parties for the purpose of planning, regulating and providing for the financing or assisting in the financing of any eligible business or project;
- Administering the Private Activity Bonds program in Chapter 50 (§ 15.2-5000 et seq.) of Title 15.2 jointly with the Director of the Department of Housing and Community Development and the Virginia Housing Development Authority.

Authorities are not allowed to: operate any manufacturing, industrial, nonprofit or commercial enterprise, or any facility of an institution of higher education; operate any medical facility or facility for the residence or care of the aged.

Despite the variety of projects and instrumental ways in which the Powhatan Economic Development Authority can participate, the County's EDA has not been particularly active in years past, even in the more traditional activities of issuing tax-exempt bonds for either the locality, non-profit entities, or qualifying private activity projects. Regardless, in order for the County to be well-prepared to execute this Economic Development Strategic Plan, implement any newly created/adopted incentives policy, or oversee any large-scale economic development activities in the future (e.g. County-owned business park), it is critical to have a defined and established EDA membership in place.

In Section 15.2-4904 of the State Code, the composition of Economic Development Authorities is also defined, beginning with the appointment of seven members (in most communities) by the local governing body. The Statute also requires the election of a chairman and vice-

chairman by the EDA membership and, if desired by the Authority, a secretary and a treasurer (or a joint secretary-treasurer) may also be elected from their membership. While the Statute does not define specific eligibility requirements to serve on the EDA, members should be knowledgeable of business issues and possess sufficient understanding of the matters in which the Authority may be involved, in order to make competent decisions on behalf the community – i.e. real estate, lending/financing, contract negotiations. For this reason, EDA membership in many localities typically includes bankers, business owners, attorneys, real estate and development professionals, or other professionals with executive-level experience in either for-profit or non-profit organizations.

While the four-year, staggered terms of IDA/EDA members helps to ensure some degree of institutional knowledge and continuity among the locality's elected governing body, it is essential that the overall goals and activities of the Authority always be aligned with those of the governing body; otherwise, it may prove difficult to carry-out the programs and objectives of the locality's Economic Development program in an effective, efficient, and successful manner – particularly in those localities where the EDA and/or the Economic Development Office are dependent on the governing body to fund its operations.

In general, the most creative and effective Economic Development Authorities typically operate under these parameters:

- Most EDA/IDA's do not receive recurring annual appropriations from the locality.
- Local appropriations are generally to support project-specific economic development activities rather than operations.
- Tax-exempt financing for private businesses has been less common in the past five years, due to favorable commercial interest rates and the investment cap on private projects (\$20 million); however, financing of facilities for non-profit and not-for-profit entities can provide a healthy revenue stream for the EDA through both application and annual administrative fees.
- EDA/IDA ownership of land or buildings, while often a significant investment for the locality, can be an attractive incentive in that properties can be leased or sold to targeted companies at below-market rates; thus, reduced or free land can be offered to qualifying companies in place of cash grants (often more difficult for local governments). In addition, localities can retain greater control over the types of companies operating on EDA-owned properties by establishing specific uses, covenants, or other restrictions not always in place for privately owned properties.
- Most communities utilize some or all of the annual bond fees collected by the EDA in their local economic development programs. Most often, the fee revenue is used to defray operating costs for the Economic Development Office (e.g. marketing expenses), or as a source of funds for local grant programs such as façade improvements or revolving loan funds.
- Local governments can use their EDA/IDA as a way to dispose of surplus properties – particularly those offering economic development opportunities – by transferring

ownership of these assets to the Authority. In turn, the EDA can use the property to generate future revenue streams through either sale or lease to independent entities.

- The EDA/IDA have regular meetings (at least annually) with the governing body to discuss priorities for the community, the role each can play in bringing projects to fruition, and if external partners are desired or needed.

B. Tourism & Agribusiness

Tourism is a collection of activities, services and industries that delivers a “travel experience,” including transportation, accommodations, eating and drinking establishments, retail shops, entertainment businesses, activity facilities and other hospitality services provided for individuals or groups traveling away from home. The World Tourism Organization (WTO) claims that tourism is currently the world’s largest industry with annual revenues of over \$3 trillion dollars. Tourism also provides over six million jobs in the United States, making it the country’s largest employer. In September 2015, Governor Terry McAuliffe announced that Virginia’s tourism revenues exceeded \$22.4 billion in 2014 (a 4.1 percent increase over 2013) and that this industry supported 216,300 jobs and provided more than \$1.5 billion in state and local taxes. The increase is largely attributed to Virginia’s authentic, local travel experiences and surging culinary scene – something many localities, including Powhatan, can offer.

For most communities in Virginia, Tourism is the combination of all things a visitor may do at any given time: sporting events, wine tasting, historic attractions, bird watching, beaches, theme parks, farms, etc. The business of Tourism is the act of developing programs using all the community’s attributes – especially natural, recreational, and historic assets – to attract visitors to the area and, more importantly, to local cash registers.

Powhatan is a beautiful, picturesque, rural county bordering the Richmond metro area, and well-known for its charm, scenic river views, boutique farms, and equine industry. In addition to the physical attributes, Powhatan offers an outstanding quality of life—good schools, reasonable real estate, and great proximity to metro Richmond employment offerings. Surprisingly, large-scale agriculture production is not a significant portion of Powhatan’s economy. In fact, although Powhatan may identify as an agriculturally-driven community, research shows that production amounts in the County are actually quite modest given its potential.

Despite a number of key assets, both Tourism and Agribusiness activities in the County have been limited. As such, Powhatan’s strategy will center on maximizing visitor expenditures, as well as methods of recruiting visitors to experience ALL that Powhatan has to offer.



A comprehensive evaluation of the County’s current tourism and agribusiness offerings reveals the following:

Key Findings: Tourism & Agribusiness

- 1) To date, Powhatan has been a rural economy rather than an agricultural economy.
- 2) The Agriculture, Forestry, Fishing and Hunting industry is not well represented in Powhatan, particularly considering the rural nature and land mass found in the County. With only eight related businesses and just 28 people employed in this sector, growth opportunities are significant and should be aggressively pursued.
- 3) The market value of all agricultural products sold in Powhatan is only about \$10 million – significantly less than comparable communities.
- 4) Limited opportunities for overnight stays in the County restrict long-term growth of tourism-focused events such as Powhatan Wine Festival, Fiber Festival, and star-gazing.
- 5) Local businesses need (and request) marketing assistance from the County to promote Powhatan as a “destination,” particularly for weddings and other special events.
- 6) Local business base desires strategies to recruit a variety of lodging options to Powhatan.
- 7) County Ordinance provisions restricting the number of animals inhibit the growth of local farms.
- 8) The County Zoning Ordinance allows for by-right uses that encourage some agribusiness and tourism activities; however, they are not always well utilized and have, historically, limited critical uses such as bed and breakfasts and boutique hotels.
- 9) “Branding” for Powhatan is a must.
- 10) The County website offers a variety of tourism listings; however, most listings require five clicks into the site before finding information.
- 11) The general public is unaware that tourism and agribusiness listings are available on the County website.
- 12) Powhatan’s land use taxation policies are quite favorable.
- 13) Many of the County’s historic resources and heritage tourism assets are not accessible or in disrepair. In addition, they lack interpretive opportunities and, in turn, ticket sales.
- 14) With an estimated 10,000 horses in Powhatan, equine-related activities offer potential revenue streams through events such as polo matches and horse shows, particularly if accompanied by creation of nearby lodging opportunities at places like Belmead Mansion & Stables.
- 15) The County is lacking a “local to local” movement.
- 16) The annual Historic Powhatan Bike Tour offers a superb opportunity for the County to promote and capitalize on a quality tourism event, yet supporting infrastructure (i.e. local lodging options) is not available.

B. 1. Tourism & Agribusiness - Initial Programming

Although rich in history, the availability of historic sites open to the public, offering interpretive resources, and generating revenue is minimal. Thus, today, Powhatan’s *visitation* strength is not being driven by history as much as it is by current uses of the land such as equine events and Powhatan State Park. This is not to say that history is not important—it is. In fact, it must be noted that the Historical Society of Powhatan has produced and continues to maintain one of the best records of historic churches and cemeteries available to the public; however, the County’s available historic offerings are static at best. More importantly, the type of investment required to restore, repair and, ultimately, generate a revenue stream from the County’s historic sites, or to compete for tourists visiting historical offerings in the Richmond area, is likely not feasible without private contributions. Subsequently, if the County is to capitalize on any of its historic assets, other opportunities must be “coupled” with these offerings in order to produce monetary benefits for the local economy. Specifically, in order for the County to achieve maximum return on investment and spur the expansion of local small businesses, Powhatan’s tourism efforts must be concentrated on: agriculture, recreation, Powhatan State Park, the James River, equine industries, specialized events (cycling, weddings), culinary experiences, and boutique farm to table initiatives. Additionally, the County should “set the stage” for lodging and accommodation businesses that will encourage overnight stays by visitors to the area, including those coming to the County for sporting and recreational events such as horse shows and soccer tournaments. Of course, the most substantial benefits for Powhatan can be realized if County leaders are willing to support establishment of the Transient Occupancy Tax to provide a continuous revenue stream from visitors staying in local hotels, motels, bed and breakfasts, inns or campgrounds that may operate in the County.



With the majority of Powhatan’s workforce traveling outside the County during the week, Powhatan’s tourism strategy must also be to reverse that trend and invite residents from the Richmond Metro area into Powhatan for special and weekend events. This can be accomplished through a cooperative effort between local businesses to jointly define, promote, and fund a tourism campaign highlighting recreational, educational, historical, agricultural and cultural activities that can be found in the County – similar to what has been done with the very successful and popular Powhatan Festival of the Grape. The County can also contribute to this effort by pursuing grant funds made available through a number of State agencies including the Virginia Tourism Corporation, Virginia Department of Conservation and Recreation, Virginia Department of Historic Resources, and Virginia Department of Agriculture and Consumer Services.

To best ensure a solid framework for Powhatan’s Tourism program, County leaders should consider the following action items:

- Acquire the **www.visitpowhatan.com** domain (or something similar) and create a website devoted exclusively to Tourism. Using the word “visit” in the domain name is generally recognized as an informational tourism site. A link to the Tourism site should also be placed on the County government’s homepage to ensure the visitor finds travel information quickly. The majority of tourism and visitor information on the County’s current website is viable and, with a little reorganization, can be migrated over to the new site to more readily provide visitors with information they are seeking. Additionally, this dedicated website can also be utilized by local residents and businesses for promoting and attending a range of events and activities.
- As information is updated and gathered for the new **www.visitpowhatan.com** website, be sure the new site is shared with and linked to the Virginia Tourism Corporation website -- **www.Virginiaisforlovers.com**. Powhatan already has privileges on this particular website but needs to keep information (and links to other sites) as current as possible.
- A final piece for promoting the County’s recreational, cultural and other tourism information is a Visitors Guide. While there are many options, a digital piece is easily managed with “flip book” software and provides a quick response to inquiries. The digital guide will be able to showcase the pictorial story of the County, and help to increase visitation through the amazing visual impact of Powhatan that can be provided. It can be debated that the website and/or digital guide should be sufficient, therefore eliminating the need for the printed piece; however, printed material is of value for distribution to regional Visitor Centers and larger Welcome Centers along the primary interstates throughout Virginia. The printed guide is also a valued resource to be used at local events by showcasing activities and offerings from the local business base.
- It is reasonable to discuss the opportunities of a regional Tourism effort for communities sharing travel routes. Typically, visitors are not aware of, nor do they care about, jurisdictional boundaries but, instead, decide where to spend their money based on the activity or experience. As Powhatan develops strategic initiatives to expand the Tourism base, particularly through Agritourism, collaborative projects with neighboring localities may prove beneficial.

B. 2. Agritourism

Just as agribusiness has been encouraged by Powhatan County for many years, agritourism is now the next appropriate, aggressive step to take. For many farm owners today, making a profit depends on diversifying farm operations to include services and products designed for visitors. Farm stands, “u-pick” operations, food trails, chef dinners, farm-to-table experiences, “glamping” (glamorous camping), equine adventures, and farm bed and breakfasts are examples of this growing national trend towards agritourism.

Agritourism is simply where travel meets agriculture; it happens when an operating farm or stable opens up to the public and offers unique activities and fun learning opportunities centered around traditional agricultural operations. For Powhatan, these might range from casual pick-your-own events, to exclusive chef-on-site dining under the stars at the farm with specialized wine pairings, followed by an overnight, high-end glamping experience and ending with a beautiful sunrise trail ride the next morning. Additionally, “how to” experiences offered by agribusinesses are very popular with visitors, especially families. For instance, making jellies, canning, or helping with livestock care can frequently morph into extended stays and summer vacations – along with additional revenue for the business and the County. While some family farms have been holding public events for years, a more concerted movement into this area utilizing the identified tourism segments can produce significant revenues, especially given the proximity of the Richmond metro area to Powhatan. To get things started, work with local farmers to establish pumpkin patches, corn mazes, pick-your-own, and other events based on local operating farms.

B. 3. Tourism & Agribusiness - Future Programming



Powhatan is fortunate to have distinctive local organizations (resources) for agriculture and tourism. These include the Farm Bureau, Extension Office, Farmer’s Market organizers, Powhatan Chamber of Commerce, and Powhatan’s Agriculture Committee – just to name a few. Participants in these types of local groups could be the start of an organization to specifically focus on the development and expansion of an agribusiness industry in the County, and to advocate for tourism-related businesses. The start-up for this type of organization will require key information and assistance from the County’s Planning Department and Economic Development point person, although a significant amount of helpful data has already been compiled through this study. It is recommended that this “Tourism & Agribusiness Advisory Committee” (TAAC) work towards building a healthier, more competitive

tourism and agribusiness environment in Powhatan. Specific, collaborative planning will be required to develop the vision, mission, and strategies for enhancing this business sector, but the end results can be both tangible and meaningful for the County and its agribusinesses.

As previously stated, a pathway to success in tourism and agritourism will involve broad categories of agriculture, equine industries, and sports/recreation – all of which could benefit greatly if overnight accommodations were available. The TAAC could be instrumental in advancing these opportunities by, first, identifying objectives and action plans based on existing

strengths of the County. In turn, lodging and unique camping (or high-end “glamping”) opportunities and partnerships can be developed to bring projects to fruition.

Although the TAAC should convene to develop their own goals and objectives, the research completed during this study suggests these particular initiatives for further investigation:

Food Trail: Identify and publicize all farm locations that offer products available to the public. Establish participation requirements/criteria, including compliance with zoning restrictions, road access, safety, and Health Department regulations. Create marketing opportunities through new County Tourism website, apps, social media, and/or brochures/flyers with maps. Define success, monitor and make adjustments.

Culinary Events: Develop and showcase culinary experiences—actual Farm-to-Chef-to-Table events. Establish participation requirements/criteria, including compliance with zoning restrictions, road access, safety, and Health Department regulations. This program could link back to the general **Food Trail** initiative. Create marketing opportunities through new County Tourism website, apps, social media and contact with local/Metro Richmond Chefs. Define success, monitor and make adjustments.

Fantastic Farms: These programs provide the “*experience*” of farming and may include “pick-your-own,” jelly-making, feeding the animals, gathering eggs, and similar activities. Establish participation requirements/criteria, including compliance with zoning restrictions, road access, safety, and Health Department regulations, as well as possible insurance (liability) requirements. This program could also link back to both the **Food Trail** and **Culinary Events** initiatives. Create marketing opportunities through new County Tourism website, apps, social media, and/or brochures/flyers with maps. Define success, monitor and make adjustments.

Equine Experience: Create events that embody all things unique about Powhatan – from your horse’s vantage-point. Establish participation requirements/criteria, including compliance with zoning restrictions, road access, safety, and Health Department regulations, as well as possible insurance (liability) requirements. This program could, again, link back to the **Food Trail**, **Culinary Events**, and **Fantastic Farms** initiatives. Create marketing opportunities through new County Tourism website, apps, social media, and/or brochures/flyers with maps. Define success, monitor and make adjustments.

B. 4. Support Networks

Special attention must be paid to the many federal, state, and local regulatory and permitting requirements that are imposed on different types of agribusinesses. To simplify matters, these same regulations and requirements generally affect *agritourism* enterprises, as well, with most being subject to the same zoning, fire and building codes, health regulations, transportation, sanitation, and agricultural food and safety laws. Gathering as much local information as possible is a great place to start in defining the important “Support Network” for both agribusiness and agritourism ventures. Specifically, fire and building code officials, health

departments, zoning officers, Virginia’s agriculture and cooperative extension agencies, and college/university representatives are typically the first points of contact in developing new or expanding programs. In addition, it is important to direct agribusiness owners to the appropriate local, regional, state, or federal agencies having oversight of matters such as safety, land use, zoning, edible products, exotic insects or plants, and products to be shipped out of state.

The following is a list of contacts for the regional, state, and federal offices focused on tourism and agribusiness:

- ❖ Richmond Regional Planning District Commission
Website: www.richmondregional.org
9211 Forest Hill Ave, Suite 200
Richmond, VA 23235
(804) 323-2033
Demographic data/sources, existing land use, rivers, corridor studies, and environmental studies

- ❖ Virginia Cooperative Extension - Powhatan
Website: www.offices.ext.vt.edu/powhatan.index.html
3910 Old Buckingham Road, Suite B
Powhatan, VA 23139
(804) 598-5640

- ❖ Virginia Department of Agriculture and Consumer Services
Website: www.vdacs.virginia.gov
102 Governor Street
Richmond, Virginia 23219
(804) 786-6911
Key resources include:
 - Stephen Versen, Agriculture & Forestry Development & Agriculture & Forestry Industries Development Fund (AFID) grants – (804) 786-6911
 - Virginia Grown: (804) 225-3663, www.vdacs.virginia.gov/vagrown/index.shtml
 - Virginia Finest: (804) 284-9452, www.vdacs.virginia.gov/vafinest.com/index.shtml

- ❖ Virginia State University – Research Office
Website: www.vsu.edu/research/
1 Hayden Drive
Petersburg, VA 23806
(804) 524-5000

- ❖ Virginia Tech Office of Economic Development
Website: www.econdev.vt.edu
702 University City Blvd. (Mail code 0373)
Blacksburg, VA 24061
(540) 231-5278

- ❖ Virginia Tourism Corporation
Website: vatc.org/home
901 E. Byrd Street
Richmond, VA 23219
(804) 545-5500
Key resources include:
 - Angela Wiggins, Virginia Tourism Orientation Program, (804) 545-5553
 - Robin Mamunes, Getting Started on Virginia.Org, (804) 545-5545
 - Wirt Confroy, Partnership & Outreach, (804) 545-5552

- ❖ United States Department of Agriculture
Website: www.rd.usda.gov/va
1606 Santa Rosa Road, Suite 238
Richmond, VA 23229
(804) 287-1550
Key resources include:
 - State Director's Office: Basil Gooden, (804) 287-1552
 - Business Programs: Kent Ware, (804) 287-1557

The agencies listed above can also bring additional assets and ideas to the table as strategies for tourism and agribusiness initiatives are developed; however, successful programs must first have the support and buy-in of the local governing body, constituencies, and agencies. Thus, the Powhatan Chamber of Commerce, Powhatan Extension Office, business owners, local officials, hospitality industry, event organizers, equine industry, State Park and recreation interests are all vital to the successful implementation of an expanded Tourism and Agribusiness program.

C. Infrastructure

In order to facilitate both traditional and agribusiness ventures, some degree of utility infrastructure and accessibility must be in place. Thus, evaluation of Powhatan's existing transportation network and primary utility systems was completed to determine current capacities, development limitations, and enhancement opportunities to better prepare for the future.

C. 1. Transportation

Regional Access and Connectivity

Powhatan has a solid framework of transportation facilities that traverse the County to allow regional movement of goods and services, as well as recreational access. The County also benefits from its rural, natural setting with river access and historical attractions which should be well-connected to the County's roadway network for ease of access.

East-West Connectivity

In the east-west direction, the County is bisected by Route 60, which runs a total length of over 21 miles. The eastern two-thirds of US Route 60 is a 4-lane divided principal arterial and the western third narrows to two lanes and is classified as a minor arterial. VDOT and the County are currently preparing a Route 60 Corridor East Special Area Plan, which will include the development of a land use plan for the corridor that will identify development opportunities, transportation improvements/enhancements, and future land use/zoning and other recommendations.

Route 711 is a minor arterial which provides local east-west connectivity to the Route 288/Route 711 interchange, the County's 711 Village area, and northern Chesterfield County to the east. VDOT is currently administering a project (UPC 86442) to widen a 1.1 mile portion of Route 711 from two to four lanes from the 288 interchange to the existing 4-lane section of Route 711 in Chesterfield County. The widening is anticipated to be complete in early 2018 and will include 4-foot bike lanes in each direction and a 5-foot sidewalk along the south side of the road. To the west, Route 711 is designated as a Scenic Byway and runs from Route 288 for approximately 13 miles where it terminates at Route 522. Significant portions of Route 711 west of 288 – though scenic in nature – are not intended for heavier traffic.



The current Powhatan County Comprehensive Plan also identifies a number of proposed arterial and collector roadways, the majority of which run east-west with connectivity to Route 60. These roadways would provide alternate options for local travelers and relieve congestion on Route 60.

North-South Connectivity

North-south roadway connectivity in Powhatan is provided by Route 522 (minor arterial) in the central part of the County and via Route 288 in the eastern area. Both of these routes have bridge crossings over the James River to the north and, further to the north, lead directly to I-64. A series of major collector roadways provides local north-south connectivity between US Route 60 and Route 711 across the County. Route 522 is the only roadway classified higher

than a local street which provides connectivity between Route 711 and the James River. The County has three collector roadways which provide access to and over the Appomattox River into Amelia County.

Route 288 / Route 711 Interchange

Route 288 provides direct access to other regional interstates (I-64, I-295, and I-95) via its interchanges with Route 60 (just east of Powhatan in Chesterfield) and Route 711, although the 711 interchange is a significantly congested area during weekday commuter periods due to heavy volume crossing the James River (nearly 50,000 VPD). The Route 288/Route 711 interchange volumes represent untapped opportunity for Powhatan to capture commercial revenues should land adjacent to the interchange be developed; however, capacity improvements may be required to support additional traffic demand at the interchange. The County has designated the area east of the interchange as the 711 Village. As such, Powhatan may want to consider a transportation overlay district (or similar revenue-generating mechanism) to designate a commercial area that contributes tax revenues to support infrastructure improvements commensurate with additional demand. Preservation of the interchange's functionality should be viewed as a very high local and regional priority.

Key Corridors – US Route 60

US Route 60 (Anderson Highway) acts as the de facto major east-west highway in the County. Subsequently, heavy development pressures in the east end of the corridor have resulted in a significant increase in traffic and signalization that, in turn, has slowed traffic throughput. The County should aggressively maintain its high access management standards on Route 60 to preserve the integrity of this important facility, particularly in the east end where traffic volume is in excess of 30,000 vehicles per day.

Key Corridors – Route 711

For economic development purposes, the capacity and safety issues of Route 711 may be offset by its unique character as a scenic byway paralleling the James River. The pending widening of Route 711 east of Route 288 will include bike lanes. This represents an opportunity to consider extending a network of bicycle routes or facilities to the west, to provide access to the numerous sites of historic interest along the corridor, as well as the James River. As a matter of perspective, Route 711's economic potential could be similar to that of Route 5 through Charles City and James City Counties – a scenic byway that is seeing increased economic activity with the build-out of the Virginia Capital Trail.

Access Management

Powhatan County has been one of the most proactive jurisdictions in the Commonwealth at prioritizing and implementing access management standards for its roadway facilities; however, the resulting increased distance between intersections and entrances poses a challenge in the

development of parcels of land for economic development. In general, the Powhatan spacing requirements and roadway classifications are more restrictive than the VDOT Access Management Standards, as summarized in Appendix F of the VDOT Road Design Manual. While such standards constrain design flexibility, they are not inherently incompatible with broader economic development objectives. Although reduced access points on major roadways can enhance the aesthetic conditions and traffic flow along key corridors, this also helps to distinguish Powhatan from neighboring jurisdictions. That said, by differing from VDOT standards, and particularly from VDOT road classifications, the County's unique requirements add a layer of complexity, restrictiveness, and unpredictability that may discourage business investment.

Powhatan's criteria for access and signal spacing along its primary arterial – US Route 60 – set an aggressive tone for ensuring that US Route 60 will not become congested beyond repair through over-development and poorly planned access. Compared to VDOT's Access Management Standards, the County holds strict traffic signal and median crossover spacing of 2,640 feet for all of its major arterials, regardless of speed limit.

Similarly, the County's minor arterials are all held to traffic signal spacing requirements of 2,640 feet and median crossover spacing requirements of 1,320 feet, again, regardless of speed limit. While these high standards are important to protecting the critical US Route 60 corridor, they may be overly restrictive for accommodating important developments throughout the County along other arterial roadways. The County's existing collector street and local street access guidelines are more lenient, but are still consistently more stringent than VDOT's guidelines.

Currently, Powhatan County access management regulations do not provide any allowances based on speed limit with respect to signal or crossover spacing. For minor arterial and collector facilities providing access to and from Route 60 and other areas of Powhatan, the County should consider adopting VDOT's access management standards, or at least consider more tiered criteria based on varied three-tiered groups of speed limits (similar to VDOT). In the interest of promoting sustainable development, a series of sensible adjustments to the County's access management guidelines may promote and facilitate additional development opportunities, while avoiding undue harm on roadway capacities.

Powhatan also does not make any allowances for a step-down in classification for driveway spacing. The standard is the same for a major arterial as a collector, meaning US Route 60 has the same standards as Urbine Road and Ballsville Road.

The Powhatan County roadway classifications are also more stringent than VDOT. For example, Powhatan classifies Maidens Road (Route 522) as a major arterial, putting it into the highest access category, whereas VDOT classifies this roadway as a minor arterial. The discrepancy in both classification and spacing standards leads to a significant difference in spacing, along with potential added confusion for developers, owners, and engineers who may be more accustomed to VDOT standards. On Maidens Road, at 45 mph, Powhatan would require 2,640

feet between signals while VDOT would require 1,050 feet. The discrepancy is even larger on roads like Old Buckingham, which Powhatan classifies as major arterial and VDOT as collector.

Refer to *Table 1: Powhatan County/VDOT Access Management Comparison* for a detailed comparison of access management standards by roadway classification and speed.

The County may want to consider revising its stringent standards to more closely align with VDOT requirements for other roadways, while maintaining the more stringent standards along Route 60. At a minimum, it is recommended that Powhatan's road classifications (and related ordinance) be revised to align with VDOT's. The County may also want to reassess its turn lane warrants as they are, again, more stringent than VDOT requirements.

Adopting an access management policy that more closely aligns with VDOT standards would provide the following benefits:

- Ease of administration through fewer waiver requests and easier coordination with VDOT;
- Fewer hindrances to development, such as limited planning flexibility, required off-site access points, or undevelopable parcels;
- Greater consistency that, in turn, will enhance certainty in the scope of required improvements and clarify the design review process – together, facilitating greater confidence in the County's overall development environment for prospective commercial and industrial users.

The County may also desire to promote parallel east-west roadways and inter-parcel connectivity between developments in order to minimize driveway turning movements along major streets. This can be accomplished through ordinance changes (e.g. similar to King George County's Highway Corridor Overlay Districts (HCODs) along Route 3 and 301) and continued application of VDOT Access Management guidelines, in conjunction with the County's current inter-parcel connection policy within the current Subdivision Ordinance.

Table 1: Powhatan County/VDOT Access Management Comparison

Access Category	Access Type										
	A. Signal to Signal		B. Signal to Unsignalized Intersection (and Crossover to Crossover)		C. Full Access to Full Access (i.e. Driveway Spacing and Corner Clearance)			D. Full Crossover to Directional Crossover		E. Partial Access to any Intersection	
	Powhatan ⁽¹⁾	VDOT ⁽²⁾	Powhatan ⁽¹⁾	VDOT ⁽²⁾	Powhatan ⁽¹⁾ <= 45 mph	Powhatan ⁽¹⁾ > 45 mph	VDOT ⁽²⁾	Powhatan ⁽¹⁾	VDOT ⁽²⁾	Powhatan ⁽¹⁾	VDOT ⁽²⁾
Major/Primary Arterials <= 30mph 35 to 45 mph >= 50 mph		1,050' 1,320' 2,640'	2,640'	880' 1,050' 1,320'	440'	625'	440' 565' 750'	No standard. Column C would apply.	440' 565' 750'	No standard. Column C would apply.	250' 305' 495'
Minor Arterials <= 30mph 35 to 45 mph >= 50 mph		880' 1,050' 1,320'	1,320'	660' 660' 1,050'	440'	625'	355' 470' 555'	No standard. Column C would apply.	355' 470' 555'	No standard. Column C would apply.	200' 250' 425'
Collectors <= 30mph 35 to 45 mph >= 50 mph		660' 660' 1,050'	1,320'	440' 440' 660'	440'	625'	225' 335' 445'	No standard. Column C would apply.	225' 335' 445'	No standard. Column C would apply.	200' 250' 360'
Local Roads⁽³⁾					200'	245'	50'				

Notes: (1) Powhatan spacing standards are measured from edge to edge.

(2) VDOT spacing standards are measured from the centerline of intersection to centerline of intersection for all access categories except local. Local road spacing is measured edge to edge.

(3) VDOT spacing standards do not include speed thresholds for local roads. Further both Powhatan and VDOT assume local roads would not have signals or medians.



Multimodal Access and Connectivity

Bicycle and Pedestrian Mobility's Role in Economic Development

Provisions for bicycle and pedestrian mobility in the form of bike lanes, sidewalks, shared-use paths, greenways, and rail-to-trail paths play a significant role in enhancing community livability. Enhanced livability, in turn, leads to greater power to capture economic development opportunities, particularly when competing with other communities. In June of 2011, the Powhatan County Board of Supervisors unanimously approved a resolution to support bicycling and pedestrian facilities in the County. The text of the resolution provided an excellent synopsis of the County's potential to benefit from such facilities, including the following:



- Powhatan's "extraordinary natural setting" make the County a "superb place for bicycling, walking, paddling and equestrian riding."
- "Trails, bikeways, paths, blue trails and greenways cultivate economic development and create jobs, attract visitors and tourists ... and encourage a better, more healthy and enjoyable quality of life" for County residents.
- The County already benefits from the annual Historic Powhatan Bike Tour, which is one of Central Virginia's premier cycling events that brings hundreds of bicyclists to Powhatan each year.
- Interstate Bike Route 1 runs on a general east-west alignment through the southern part of the County, and is part of a continuous bike route in the eastern United States that connects Calais, ME to Key West, FL and attracts tourists from all over the world.

The County should capitalize on the seeds of success (Powhatan State Park, pending bicycle lanes on Route 711, etc.) to further enhance its bicycle and pedestrian facilities, with a goal of connecting them Countywide for the greater enjoyment of residents and visitors alike.

River Access

The James River winds for approximately 31 miles along the northern border of Powhatan County and the Appomattox runs for approximately 24 miles along the southern border. Although neither river is navigable for commercial purposes, this riverfront access is a unique and tremendous opportunity for the County in terms of recreational access. As noted in the County's 2010 Comprehensive Plan, "access to the James and Appomattox Rivers are examples



where natural conservation and economic development can work hand-in-hand.”

While Powhatan should strive to continue to preserve and enhance its river access in a responsible manner, the County should also seek interconnections between its river access points and suitable roadway and bicycle/pedestrian facilities, as this can achieve synergies that will help maximize the County’s tourism potential. Powhatan State Park is an emerging success story for the County in terms of river access and bicycle/pedestrian mobility. With two miles of river frontage and nearly seven miles of trails, continued improvements to the Park’s accessibility and on-site amenities can be a catalyst for additional trail and riverfront improvements across the County.

Rail Access

Powhatan’s only rail line consists of an approximate 6-mile length of Norfolk Southern (NS) right-of-way that traverses the southeast sector of the County in the Moseley area; however, it has very limited connectivity (via Collector roadways) to US Route 60. As a result, the economic development potential via NS Railroad (i.e. to serve industrial users with rail spurs) may be hindered by the lack of suitable roadways to carry goods to market. To determine the future viability, the County should consider an industrial access study of railroad accessibility along the existing Norfolk Southern right-of-way. If deemed viable, an action plan for enhancing access and recruiting businesses – either through development of a business park or proactive land acquisition for targeted users – should be pursued.

Airport Access

While Powhatan does not have its own airport (passenger or general aviation), Richmond International Airport is a major regional airport located just over 30 miles to the east of the County seat. As economic activity increases in the County, the development of a local airport should periodically be evaluated as a long-term planning goal to enhance the County’s economic development opportunities.

C. 2. Water / Wastewater Infrastructure

Although the main utility corridor for water and wastewater service is predominantly located along US Route 60, there may be economic drivers that would translate into interest in locating a business outside of this established water and sewer district. Such businesses may include wineries, micro-breweries, and retreat complexes. These businesses are, typically, heavily dependent on water and the ability to cost-effectively dispose of the wastewater generated by the processes used in making their product but, also, wastewater generated by staff and patrons of the establishment. It is recognized that these types of businesses often prefer more rural settings to take advantage of the natural features and to create an atmosphere where it is viewed as a destination as opposed to a “stop by” type of establishment.

Over the last several years, there have been sweeping changes in the regulations governing on-site disposal of wastewater. There has been significant progress in the development of technologies to achieve a high degree of treatment for on-site systems focused on nitrogen removal to protect the groundwater. The changes in these regulations have recognized the technological improvements in the pre-treatment systems and providing for greater flexibility in locating suitable drainfields for the safe and effective disposal of treated wastewater. Soil types and drainfield areas once deemed unsuitable are now being considered for on-site disposal utilizing the right pre-treatment system. These technological advances in pre-treatment equipment include facilities sized to serve individual residential units, as well as larger facilities with larger flows to be disposed of in a mass drainfield. Within the Commonwealth of Virginia, there have been systems approved for up to 100,000 GPD.

The advantages of employing this type of treatment and disposal system include increased options for locating such businesses within a community. It eliminates the need to extend sewer lines from the main water and sewer district out to the remote areas, potentially facilitating development corridors that may not have previously been considered due to utility constraints. These types of systems also require less operation and maintenance costs than central wastewater treatment systems that have been permitted by the Department of Environmental Quality (DEQ). In fact, DEQ oversight is not required for these independent systems, although the necessary permit must be obtained from the Virginia Department of Health.

Other benefits can also be realized, such as the implementation of green disposal techniques. The method of dispersing the treated effluent is through the use of drip irrigation, encouraging re-use of the treated water and enabling continued use of the drainfield area for farming and crop production. This type of dispersal employs small diameter tubing with flow emitters that inject a fixed amount of treated water into the soil. Typical buried depths range from 18 – 24

Creative alternatives, such as community water systems, can be used to provide essential utilities that, in turn, enhance the locality's opportunities for economic development.

inches. As such, the tubing is below typical tilling depths of 6 – 9 inches, which enables the drainfield area to continue to be farmed. This concept of decentralized wastewater treatment has been successfully employed in Loudoun County, Fauquier County, and Accomack County.

Alternative methods for providing potable water service to business enterprises wanting to locate outside of the Water District are also available. One viable option is the development of community water systems that are designed and sized to serve a specific need or development area. These systems rely on groundwater as the source, and the system includes storage and treatment as needed to meet water quality standards. An independent distribution system could be limited to the specific use – such as a brewery, a “hamlet-type” community, a retreat/tourism area, or continuing care facility – without creating a development corridor extending from the water district. These systems can be privatized to a reputable operations company or they can be owned by the locality, insuring the systems are

operated and maintained properly. Of course, these systems would be required to meet all of the regulatory requirements of the County’s central system, such as water quality, fire protection and reliability.

Examples of these types of community facilities can be found in Loudoun County’s Courtland Farms, Selma Plantation, and Lenah Farms. These planned unit communities are geographically located outside of the local service authority’s coverage area, where extension of public sewer and water from the service district is in conflict with the planning and utility ordinances adopted by the Loudoun County Board of Supervisors. Subsequently, development of the community water and sewer systems to serve a limited, defined area has provided an attractive and viable option for the local governing bodies, since service to other areas is still restricted. With these projects, the water and sewer infrastructure can be designed and constructed by the developer and then conveyed to the local service authority; thus, there is no cost to the locality. This alternative can also be beneficial to the



Selma Wastewater Treatment Plant

local service authority, as it can acquire the full infrastructure system with no debt service, yet with the ability to set user rates at a level that insures operating costs of the system are adequately covered.



Lenah Farms Water System

Another example of this type of community system is the Fauquier Hospital/Retirement Community, known as Suffield Meadows, in Fauquier County near the Town of Warrenton. The development is an independent living community with a continuing care facility that allows residents to transition from independent living to a more care based environment

with specialty care services. This project is also located outside of the local water and sewer authority’s service district; however, due to its prime location off US Route 29, it offers strong potential from an economic development perspective and, also, provides a valuable service to our aging population. The independent wastewater facility serving this community includes an advanced wastewater treatment system with a drip irrigation system for disposal. A private company under contract with the community homeowners’ association, of which Fauquier Hospital is a member, performs the operation and maintenance of the system.

A closer example of the application of the community water system concept includes the Route 711 area of Powhatan County. This area is currently served potable water from an interconnection with the County of Chesterfield’s water distribution system, immediately adjacent to the County line. This interconnection was established to provide water service to the Founder’s Bridge development in Powhatan County, and was required since Powhatan had

not yet established reliable sources of water to support this development. As the demand for water in this vicinity has increased, the ability for Chesterfield to continue to supply water to this area of Powhatan County has become limited. In turn, future growth in this section of Powhatan is also limited unless an alternative is provided. The initiative underway by the developer is to provide another source of water using a series of groundwater wells. These wells will serve as the primary source of water for the area, and augment the supply provided by Chesterfield County; thus, Chesterfield's supply will be used only during peak events, such as firefighting or summertime usage. This creative approach further demonstrates how community water systems can be used to provide essential utilities that, in turn, enhance the locality's opportunities for economic development, without extending water lines from the central utilities district.

Primary Water/Wastewater Considerations:

- 1) There are three main areas within the County that have public water and sewer availability. These include the Courthouse area, the Flat Rock area, and the Route 711 area.
- 2) Water service in the Courthouse area is provided by a private water company – Aqua Virginia, Inc. This system has limited capacity to expand to serve new customers. The recently completed Water and Wastewater Master Plan indicates the water demands in this area will exceed the available capacity by the year 2020.
- 3) Wastewater service in the Courthouse area is provided by Powhatan County at their Fighting Creek Wastewater Treatment Plant (WWTP). This WWTP has capacity to treat up to 100,000 gpd – which is adequate to serve the current and projected population growth up to approximately year 2022, as indicated in the Water and Wastewater Master Plan. This additional capacity could serve offices, warehouses, and light manufacturing with employment figures of 4,000 – 5,000 people.
- 4) Water service in the Flat Rock area is provided by a water line extending from the Chesterfield County line along Anderson Highway. The source of water is from Chesterfield County and the distribution system is owned and maintained by Powhatan County. The supply provided by Chesterfield County is limited to 572,000 gpd as a maximum day demand.
- 5) Wastewater service in the Flat Rock area is provided by Powhatan at their Dutoy Creek WWTP. This WWTP has the ultimate capacity to treat up to 250,000 gpd – which is adequate to serve the current and projected population growth up to approximately year 2028, as indicated in the Water and Wastewater Master Plan.
- 6) Water service in the Rt 711 area is provided by Chesterfield County, wherein the supply of water comes from a connection to Chesterfield County's water system with a fixed daily allocation of water. This allocation is currently at or near its limit. New business activities in this area requiring water may have to consider alternative sources of water, unless Powhatan County can negotiate additional allocations from Chesterfield County. The Water and Sewer Master Plan also suggests a connection to Goochland County's system, as a long-term solution to supplying this area with potable water.

- 7) Wastewater service in the Route 711 area is also provided by Chesterfield County. While this service is not as restricted as it is with the water system, it is assumed that the amount of wastewater flowing to Chesterfield is also limited.
- 8) Options exist to provide “point of use,” community water and wastewater systems to support and encourage growth in Powhatan beyond the limits of its existing water and wastewater infrastructure.
- 9) Independent water and wastewater systems have been successfully used in other parts of the Commonwealth of Virginia. Community based systems help maintain the rural nature of the County without sacrificing economic development opportunities, and can even be effectively utilized by manufacturing operations such as craft breweries.
- 10) These systems are permitted by Virginia Department of Health (VDH) and not DEQ, providing for a quicker permitting process. In addition, it appears these systems are allowable under the County’s current ordinances.
- 11) This type of infrastructure development allows for planned growth in desirable areas, without requiring long extensions of pipelines that, in turn, often facilitate unwanted sprawl-type growth.

C. 3. Franchise Utility Infrastructure

Electrical Power

The majority of Powhatan County is served by Dominion Virginia Power (DVP). A 230 kV Dominion transmission line runs east-west through the northern half of the County. Power is provided to customers within the County via distribution lines that feed off of the 230 kV line via the DVP Powhatan and Midlothian substations. This line connects to the Bremo Power Station to the West. To the east, at the Midlothian substation, the 230 kV line connects to two 500 kV supplies.



The remainder of Powhatan County is served by the Southside Electric Cooperative (SEC). The SEC distribution system is fed by the 230 kV DVP transmission lines which leads to smaller transmission lines and eventually into the distribution lines to which customers connect. The DVP and SEC service areas are shown on *Figure 3: Powhatan County Utilities Map* on page 36.

The general eastern third of the County is served by a DVP distribution network originating at the Midlothian substation. This includes the Route 60 Corridor East and the 711 Village Urban Development Areas (UDA's). Distribution power of 34.5 kV is available in this area and additional circuits are presently available from the Midlothian substation should they be needed. The remainder of the DVP distribution system within the County is fed by the Powhatan Substation.

Redundant power connections are currently not available in Powhatan County; however, redundancy could be provided by DVP with the addition of circuits from either existing substations or by extending circuits already in place. The 230 kV line could also support an additional substation should one be needed; however, any new substations require permitting

by the Virginia State Corporation Commission (SCC), a process typically taking 12-18 months. It may also be possible to provide dual 230 kV feeds by adding a switching or breaker arrangement on the 230 kV transmission line. Redundant distribution connections can generally be provided by DVP throughout the County with approximately six months' notice, subject to available right of way.

As a matter of reference and comparison, the Bedford County Office of Economic Development and Bedford's Economic Development Authority recently partnered with Southside Electric Cooperative (SEC) to construct and energize a new electrical substation to serve the County's New London Business and Technology Center. In this case, the substation was essential to facilitating the continued build out of the park – its growing need for electricity to support and attract future businesses, including advanced manufacturing firms that have heavier electricity needs. Bedford County's level of investment to increase the electrical capacity in the park was reportedly \$3.2 million. The substation's power is supplied by Dominion Virginia Power (DVP) via a 115kV transmission line, and will provide 25-Megawatts of capacity through an underground distribution system. This will provide tenants with a stable and reliable source of electricity within the park.

Dominion indicates that its transmission facilities are generally sufficient to serve the majority of anticipated development in Powhatan County such as agribusiness, tourism, residential, retail, mixed-use development, and light industrial. More intense land uses such as heavy industrial, or perhaps a 100-acre plus business park, requiring power in excess of approximately 5 MW will require further discussion with DVP to determine how to adequately provide service. Should extension of DVP facilities be required to serve commercial/industrial uses, DVP would consider rebates for larger projects to help offset the cost of extending the facilities.

According to SEC officials, the utility would also be willing to pay for some or all of the cost associated with constructing the required electrical service extensions up to the point of metering. The level of SEC investment depends on the size of the electrical load (i.e. up to \$600,000 in example #1 noted below), subject to an extension contract and periodic re-evaluation of the actual load usage.

It should also be noted that in July 2014, Agriculture Secretary Tom Vilsack announced that the USDA would invest \$236.3 million to help modernize and improve the reliability of rural electric systems in eight states. The investment is aimed at modernizing rural electric infrastructure, to help better support economic development in rural areas while helping to ensure reliable and affordable electric service for people who live and work in small communities. SEC is a beneficiary of the USDA investment, receiving a \$40 million loan guarantee. The funding is being used to build seven miles of new transmission lines, construct new substations and switching stations, improve 736 miles of distribution lines and prepare line extensions for anticipated growth. More than \$10 million will go to smart grid projects, including advanced metering. Smart grid refers to the application of technologies designed to increase the reliability of electric power by helping utilities better manage the electric grid, such as during peak demand, to improve operational efficiencies. Converting the distribution lines at three

SEC substations from 12.47 kilovolts to 24.94 kV is expected to reduce line loss and purchased-power expenses, and improve overall service reliability; however, further research and discussion with SEC officials should be conducted to determine the extent of potential benefits these improvements may have for both existing and future customers in Powhatan.

A comparison of DVP and SEC power costs to other energy providers is summarized in the following table. Example #1 would represent a typical industrial customer, such as light manufacturing or assembly/distribution operations. Example #2 would represent a typical commercial customer, such as office or warehouse facility.

Example #1 – Cost/kWh for Industrial Customer w/Demand of 1,000 kW and using 650,000 kWh/month (90% load factor)

Dominion Virginia Power*	\$	0.0568
Southside Electric Co-Operative**	\$	0.08134
Appalachian Power*	\$	0.0667
Duke Energy Progress*	\$	0.0673
Georgia Power*	\$	0.0831

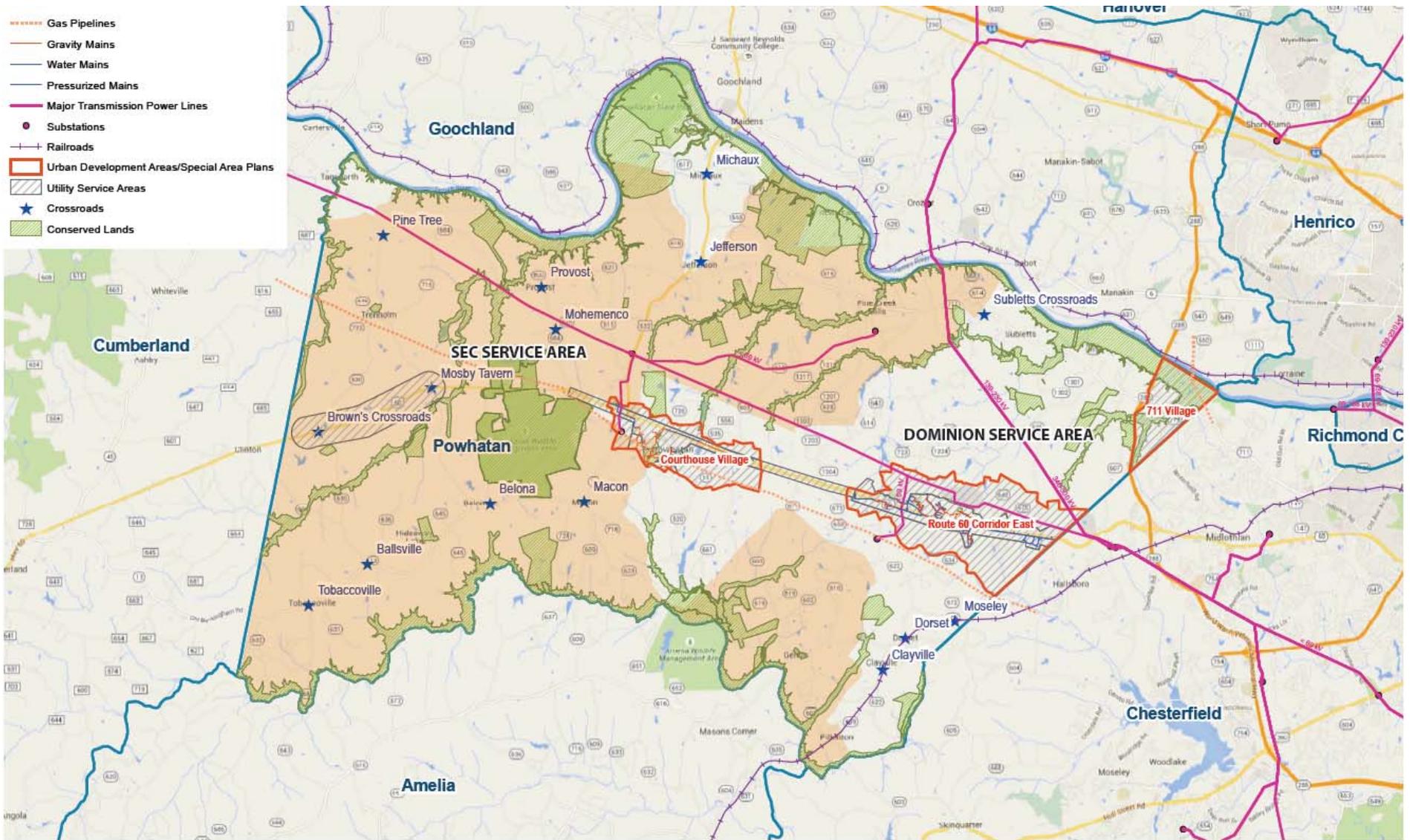
Example #2 – Cost/kWh for Commercial Customer w/Demand of 500 kW and using 180,000 kWh/month (50% load factor)

Dominion Virginia Power*	\$	0.0808
Southside Electric Co-Operative**	\$	0.0985
Appalachian Power*	\$	0.0928
Duke Energy Progress*	\$	0.0739
Georgia Power*	\$	0.1032

* Source: Edison Electric Institute's "Typical Bills and Average Rates Report - Winter 2015"

** Source: Estimates provided by Southside Electric Cooperative

Figure 3: Powhatan County Utilities Map



Powhatan County, Virginia

7/10/2015
Bowman
 CONSULTING

Natural Gas

Natural gas is a clean and efficient energy source often used for heating, cooking, and power generation. It is also used as fuel for vehicles and as a chemical feedstock in the manufacture of plastics and other goods and products. Natural gas is often described as the cleanest fossil fuel and is attractive to consumers for its relatively low cost compared to other fuel sources. Consequently, the availability of natural gas to serve future economic development prospects is important for the marketability and value of targeted development growth areas and sites.

For purposes of this study, information was gathered regarding service provided by Columbia Gas of Virginia relative to their existing infrastructure within the County. Columbia Gas of Virginia is the jurisdictional gas utility provider for Powhatan County based on information published by the Virginia State Corporation Commission, Division of Energy Regulation. Columbia Gas of Virginia has indicated that existing infrastructure within the County is very limited, and they presently serve only the Founders Bridge residential community and the near-by Westchester Commons commercial development in Chesterfield County on Route 60.

As an alternative to natural gas for use in smaller applications, propane gas is available throughout Powhatan County. The gas pipeline traversing the County east-west, as identified on the attached maps, is a transmission pipeline that is not available for direct connection by consumers.

It is recommended that efforts be taken to provide sufficient confidence that additional strategic growth areas within the County may be adequately served with natural gas, how service may be attained, and at what cost. At a minimum, it is recommended that Columbia Gas of Virginia be engaged to develop sufficient planning documentation related to the extension of natural gas service westward on Route 60 (Anderson Highway). Planning and documentation should focus specifically on identifying how and where natural gas service mains may be extended along the corridor; where easement rights may be required to install such service mains; required service application, design and construction processes; anticipated service capacities and pressures; anticipated costs, and funding options.

Additionally, the County should explore the NEED (Natural Gas Energy Infrastructure for Economic Development) Legislation which facilitates the expansion of natural gas infrastructure to support economic development in underserved areas of the Commonwealth, by deferring up-front cost for recovery through rates.

Telecommunications

Because of its advantages over electrical transmission, optical fibers have largely replaced copper wire communications in core networks. Optical fiber is now used by many telecommunications companies to transmit telephone signals, Internet communication, and cable television signals. Due to much lower attenuation and interference, optical fiber has large advantages over copper wire in long-distance and high-demand applications, and it possesses inherently high data-

carrying capacity. Optical fiber is generally chosen by users for systems requiring higher bandwidth or spanning longer distances than electrical cabling can accommodate.

To provide the utmost attractiveness for economic development potential, targeted growth areas and economic development sites should be served by optic fiber. Depending of the nature of future uses or industry on the property, redundant optic fiber (broadband) service will also be vital for marketability and value enhancement.

Research indicates that backbone fiber infrastructure in Powhatan County is owned and operated by the Mid-Atlantic Broadband Communities Corporation (MBC). Their fiber network is located along Old Buckingham Road (south of Route 60) and along Route 60 west of the Old Buckingham Road/Route 522 intersection. Since its inception, MBC's effort to build a robust fiber network throughout Southern Virginia supports their primary mission to create jobs and revitalize communities in the region. MBC states that by delivering high-speed broadband access across underserved communities, they help open doors for businesses to locate operations across Southern Virginia with confidence they have reliable broadband access at any capacity level. MBC operates an open-access network that enables businesses to work with the communication provider of their choice to secure diverse network access. MBC is a non-profit entity.

MBC owns and operates over 1,800 route miles of fiber optic network in Southern and Southeastern Virginia. The MBC open-access fiber network provides carrier-class optical transport services utilizing Ciena's 6500 platform and Cyan's carrier Ethernet platform. This backbone network includes multiple OC-192 SONET/TDM rings and multiple 10G Ethernet rings to provide a robust, reliable, and scalable infrastructure to support customer transport needs. MBC supports traditional TDM transport services (DS1 - OC192), Ethernet over SONET, carrier Ethernet, and wavelength support. Technical details of the network include:

- 144 strand SMF-28E fiber backbone, armored sheath protection
- Approximately 90% of network is underground construction, 10% aerial construction
- Backbone node facilities are secured 12' x 20' concrete shelter buildings*
- 200 and 300 amp DC power systems, battery backups, and emergency generators on-site

** MBC operates a backbone node facility in Powhatan adjacent to the Southside Electric Cooperative offices on Old Buckingham Road.*

The existing MBC fiber backbone infrastructure is an important element to driving economic development success, and provides Powhatan with an important tool as it explores ways to drive economic growth. Regardless, it is recommended that efforts be taken to provide sufficient confidence that the targeted growth areas and/or strategic development sites that are beyond the existing fiber optic routes may be adequately served with this critical utility, how service may be attained, at what cost, and in what timeframe. In order to obtain a better understanding of the required improvements to adequately support anticipated future land uses in Powhatan, the County may want to engage the services of MBC and/or a specialized consultant to perform detailed due diligence relative to existing broadband infrastructure and expansion opportunities.

sufficient inventory of sites to accommodate business recruitment and retention efforts, as well as a competitive land market.

Adoption of a policy objective outlining the desired composition of the real estate tax base would assist in facilitating such on-going evaluation and further provide a quantifiable measure of progress toward broader economic development goals. Specifically, the County should consider establishing a target percentage of the County's real estate tax base to be comprised of commercial and industrial land uses, and this target should be accompanied by related fiscal objectives (e.g. target tax rates). Many jurisdictions strive for 20% to 30% of the real estate tax base to consist of commercial and industrial land uses and integrate this objective with their planning approaches and materials. Establishing such a target would provide the County with an additional "tool in the toolbox" for determining the sufficiency of the amount of land planned, zoned, and developed for commercial and industrial land uses, and would provide a rational basis for "right sizing" land use plans and related documents.

Time = Money!

D. 2. Expedited Review Process

The time required to complete the plan review process has significant financial and operational implications for existing businesses seeking to expand, as well as prospective businesses seeking to locate in the County. Minimizing the delay between a given business's decision to build and the commencement of construction is, therefore, critical to supporting and promoting investment in the County. That said, Powhatan does not currently provide a formal mechanism for either requesting or administering an expedited plan review process – not even for commercial or industrial projects whose development schedule is imminent. Subsequently, it is recommended that an expedited plan review process be instituted as an essential component of the County's overall economic development strategy. Said process should be focused on commercial and industrial projects that are "shovel ready," meaning they will start construction immediately upon site plan approval, and involve a Memorandum of Understanding outlining a mutually agreeable review schedule, as well as the responsibilities and expectations of both County staff and applicant.

D. 3. Zoning Ordinance Review

ARTICLE IV - VILLAGE GROWTH AREA DISTRICTS

Village Center (VC) District: Permitted and Conditional Uses

Ordinance Reference: Sec. 83-231.; Sec. 83-232.

Findings and Recommended Action Steps:

The conditional use list should be evaluated to determine whether any such uses are instead appropriate as permitted ("by right") uses. If a conditional use is ultimately converted to a permitted use, performance standards could be added to Article VII to ensure mitigation of any

unique impacts of concern. Specifically, medically-related uses and quasi-institutional uses, such as nursing facilities, hospice facilities, assisted living facilities, and CCRC (continuing care retirement community) should be evaluated for inclusion as permitted/by right uses, as should veterinary clinics. It is noted that these uses are permitted by right in the Commerce Center (CC) District, so allowing as conditional uses in VC District is certainly consistent with the County's zoning hierarchy. However, the referenced uses may, nevertheless, be appropriate in this district by right, especially given their intended integration with surrounding residential neighborhoods.

Commerce Center (CC) District - Permitted and Conditional Uses

Section Reference: Sec. 83-241.; Sec. 83-242.

Findings and Recommended Action Steps:

The conditional use list should be evaluated to determine whether any such uses are instead appropriate as permitted ("by right") uses. If a conditional use is ultimately converted to a permitted use, performance standards could be added to Article VII to ensure mitigation of any unique impacts of concern. In particular, conference or training center and civic center uses are desirable and often sought-after complements to commercial nodes that also include hotel and office complexes. Additionally, they can serve as a catalyst for other supportive commercial activities and services. Such uses should, arguably, be enabled to develop without discretionary review/approval. Similarly, since college or university uses often develop in myriad formats – ranging from campuses with multiple buildings/components to a single building or "storefront" in a multi-use commercial center – they can serve as a desirable anchor establishment. Performance standards could be developed to address predictable externalities, and components with unique attributes and/or potentially substantial impacts could still require review and approval as conditional uses (i.e. stadiums). Additionally, to encourage inclusion/provision with by right commercial development and as a desirable component of such projects, public square or plaza should be permitted by right. Indeed, public square or plaza should be treated as an amenity feature, as opposed to a defined land use. If deemed necessary, performance standards governing design of such spaces could be adopted, governing such elements as minimum/maximum size, surface treatments, landscaping, and seating.

Industrial (I-1) District - Building Setbacks

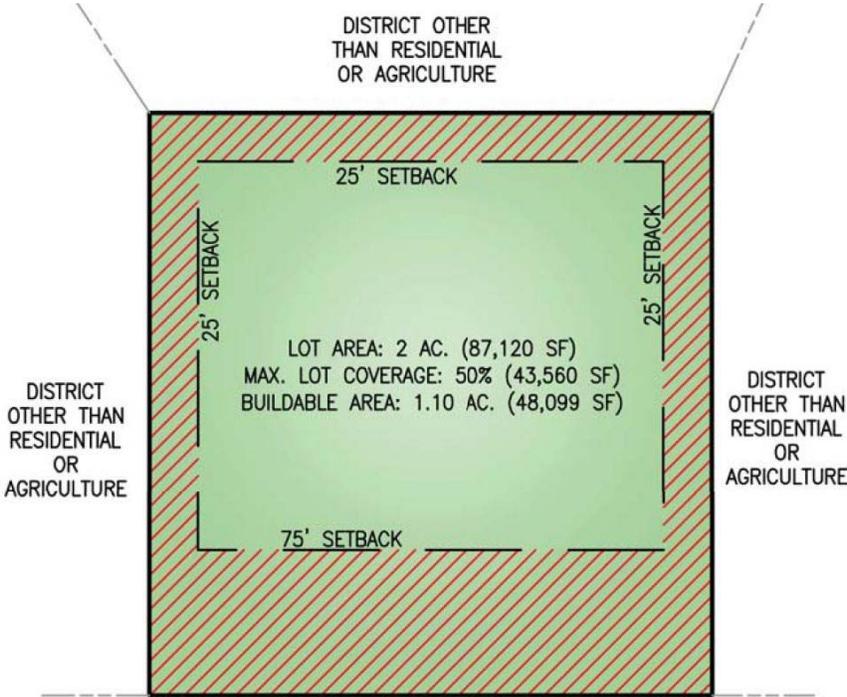
Ordinance Reference: Sec. 83-250.C.

Findings and Recommended Action Steps:

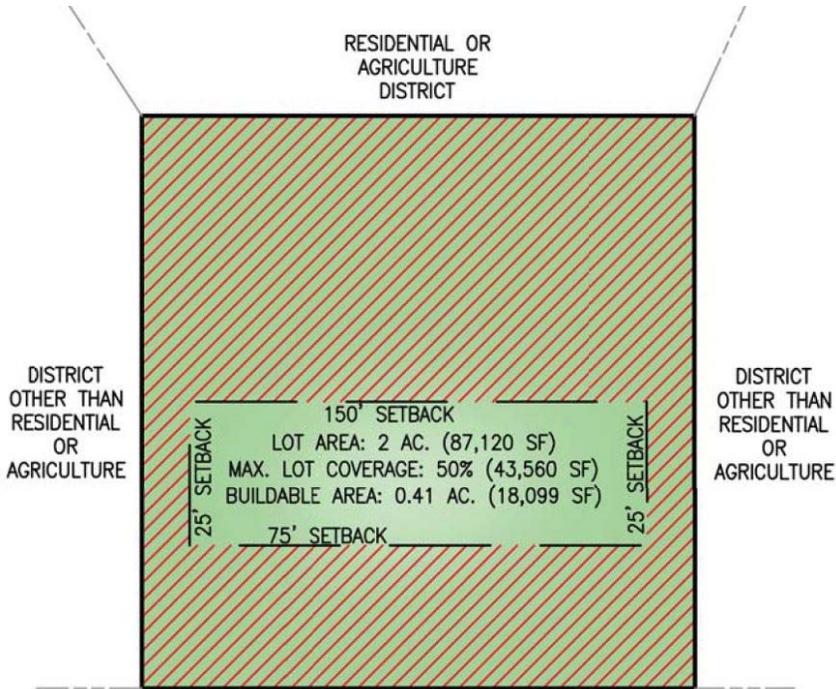
The required building setbacks are substantial in depth and pose a significant constraint impacting site design and ultimate site utilization for industrial/heavy commercial uses. It is recommended that required building setbacks in the industrial districts be reduced for all development scenarios regardless of adjoining zoning district or land use. In combination with the reduced building setbacks, applicable buffer yard standards should be refined as the primary method of impact mitigation when industrial/heavy commercial uses adjoin residential, agricultural and rural uses.

Under the current ordinance, new residential development is not required to provide any buffering or additional setback when proposed adjacent to industrially zoned acreage. As such, the owners and/or users of industrially zoned properties bear the full burden of impact mitigation between uses by providing extensive building setbacks (i.e. 150' adjacent to residential/agricultural districts) as well as buffer yards, whereas a residential developer is required to provide nothing. Development standards should be revised to ensure impact mitigation is more equitably shared across land use and zoning categories.

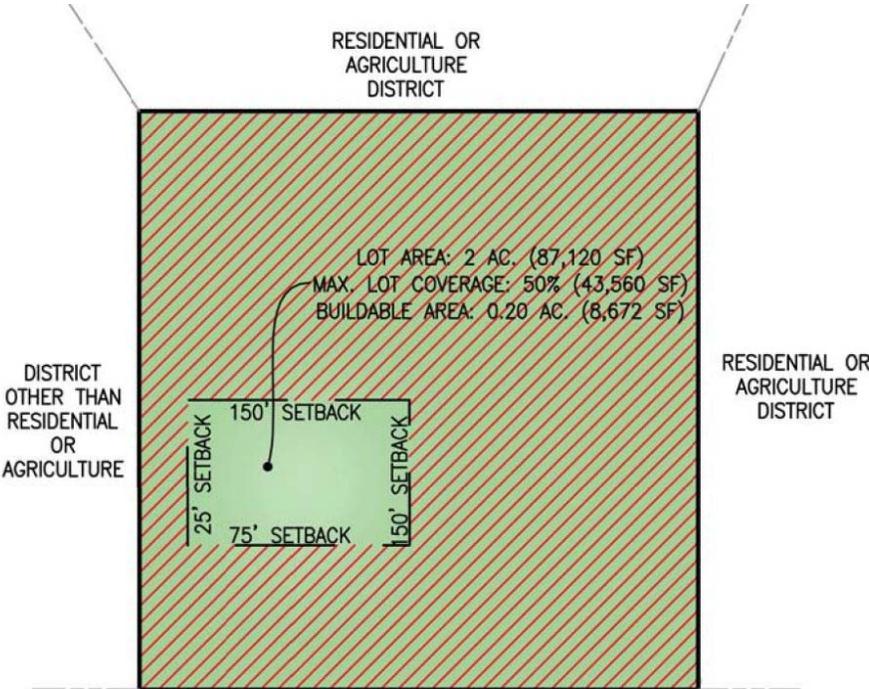
The following exhibit illustrates the impact of current building setback requirements on the developable area of a typical industrially zoned (I-1) property in the County (2 acres in size):



TYPICAL I-1 LOT WITH MINIMUM SETBACKS



TYPICAL I-1 LOT WITH RESIDENTIAL OR AGRICULTURAL DISTRICT REAR SETBACKS



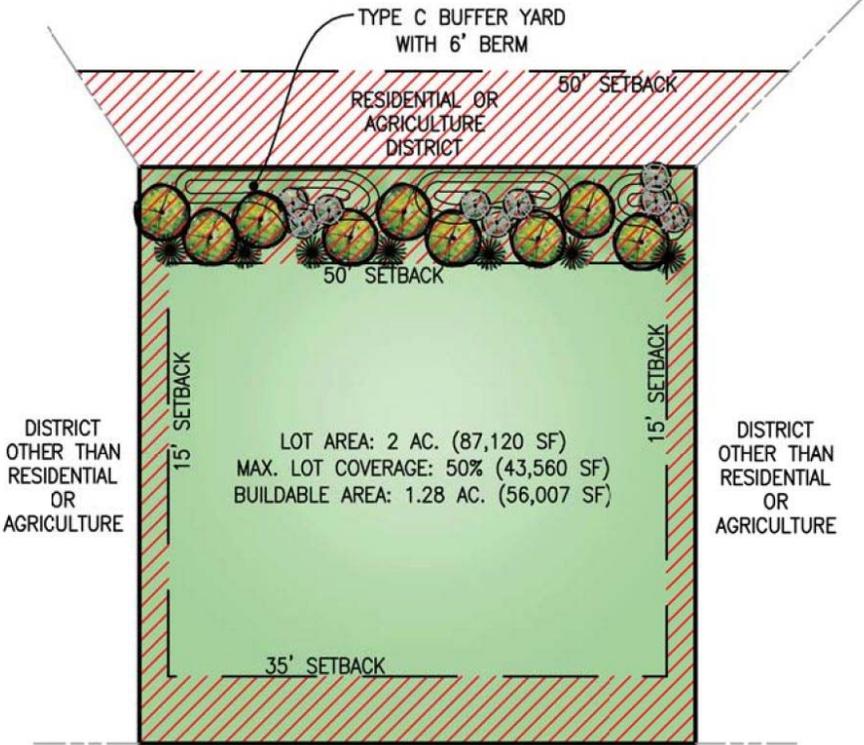
TYPICAL I-1 LOT WITH RESIDENTIAL OR AGRICULTURAL DISTRICT REAR AND SIDE SETBACKS

The maximum lot coverage can be achieved only when the lot adjoins similarly zoned properties on the sides and rear. As shown, when an industrially zoned lot adjoins a residentially or agriculturally zoned property, the applicable building setback significantly constrains the buildable area and severely limits the property's development capacity. Indeed, in either scenario involving adjoining residential or agricultural zoning, the buildable area is well below the maximum allowable lot coverage. Such constraints reduce the viability and value of industrially zoned parcels for investment by prospective users, and arguably discourage such investment.

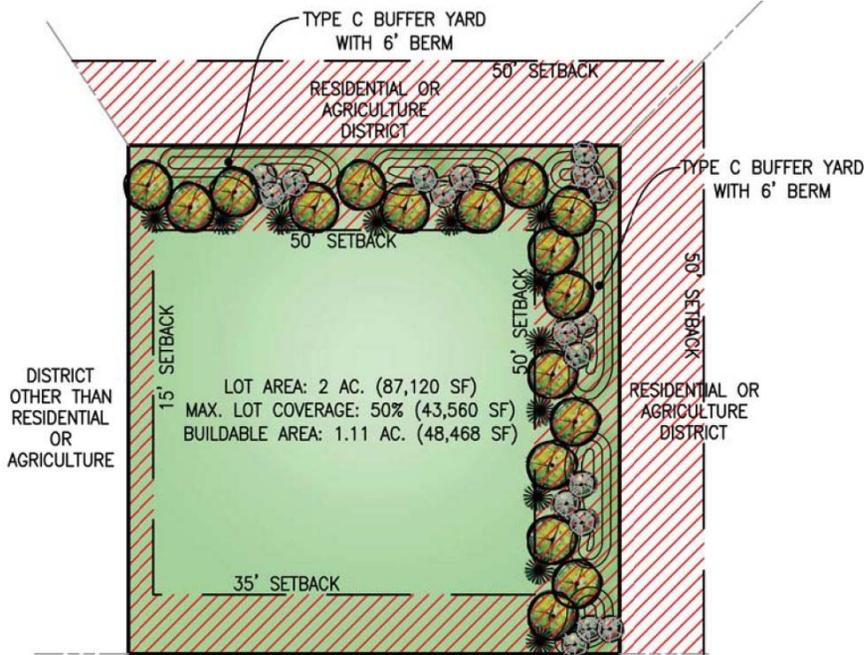
It is recommended that the setback requirements be reduced as follows, to ensure attainment of the maximum lot coverage on industrially zoned properties regardless of the adjoining zoning/use:

Side/Rear Setback – Adjacent to other similarly zoned properties, the side/rear building setback should be reduced from 25' to 15'. The recommended reduction will increase the building envelope to enhance layout flexibility and site utilization, while ensuring a minimum 30' corridor between buildings for emergency access. Adjacent to residentially or agriculturally zoned properties, the building setback should be reduced from 150' to 50', with accompanying refinements to applicable buffer requirements to facilitate effective impact mitigation. Recommended revisions to buffer yard standards include adjusting the minimum width to 50', mandatory provision of a 6' opaque element (with preference for earthen berms), and addition of a 50' buffer requirement be provided with any residential subdivision proposed adjacent to industrially zoned property. This will ensure a combined 100' wide buffer is equally shared between the industrial and residential properties.

Front Building Setback – The minimum front building setback should be reduced from 75' to 35' for industrially zoned properties located on local/secondary roads and, particularly, when such properties are situated within commerce/industrial parks. This recommended setback reduction will increase the available building envelope, thereby enhancing layout flexibility and site utilization. The recommended front setback of 35' will achieve appropriate massing and scale of buildings relative to adjacent roadways within industrial settings, as the minimum setback will be equivalent to the maximum height (i.e. 1:1 ratio). The current 75' front building setback should be maintained for lots with frontage on major collector or arterial roadways.



TYPICAL I-1 LOT WITH ALTERNATIVE RESIDENTIAL OR AGRICULTURAL DISTRICT REAR SETBACKS



TYPICAL I-1 LOT WITH ALTERNATIVE RESIDENTIAL OR AGRICULTURAL DISTRICT REAR AND SIDE SETBACKS

Parking Lot Setback

Ordinance Reference: Sec. 83-250.C.

Findings and Recommended Action Steps:

The minimum 50' parking lot setback (front) is substantial and poses a significant constraint to site design and utilization. When industrial properties are located on local/secondary roadways and/or situated within commerce/industrial parks, it is suggested that the front parking lot setback be reduced from 50' to 10' from the road right of way. Said setback is slightly larger than the minimum perimeter landscaping strip required for vehicular use areas (6' per Sec. 83-461.C.3.), and will provide improved site layout flexibility and enable enhanced site utilization. In the case of industrially zoned properties with frontage on major collector or arterial roadways, a minimum front parking lot setback of 35' is recommended. If the visual impact of parking is a concern, it is recommended that this impact be addressed with intensified landscape planting requirements or the addition of a parking lot buffer standard.

Building Height

Ordinance Reference: Sec. 83-250.C.

Findings and Recommended Action Steps:

To accommodate variations in building and facility requirements for industrial uses, it is recommended that building heights be permitted to increase above 35' with a corresponding increase in building setback, up to a maximum height of 60'. The additional setback is intended to mitigate visual impacts associated with increased building scale and massing, and could effectively be achieved at a ratio of 1:1 (i.e. 1' of additional building setback for every 1' of building height over 35'). That said, a ratio of 2:1 would go further toward impact mitigation, although it may limit the capacity of smaller lots to support more varied facility configurations.

Lot Coverage

Ordinance Reference: Sec. 83-250.C.

Findings and Recommended Action Steps:

The current maximum lot coverage of 50% constrains development/use opportunities, as well as flexibility in design. Increasing the maximum lot coverage to 60% would enable improved flexibility in design while also supporting expansion/reconfiguration of established industrial uses over time.

Permitted and Conditional Uses

Ordinance Reference: Sec. 83-251.; Sec. 83-242

Findings and Recommended Action Steps:

The conditional use list of the I-1 District should be evaluated to determine whether any such uses are, instead, appropriate as permitted ("by right") uses. If a conditional use is ultimately converted to a permitted use, performance standards could be added to Article VII to ensure mitigation of any unique impacts of concern. In particular, the following conditional uses may

be appropriate in the I-1 District without legislative review/approval: civic center, place of worship, animal shelter/pound, kennel (commercial), and business service establishment. Each of the aforementioned uses could be compatible in the I-1 District, and are especially conducive to the use of performance criteria to guide development.

D. 4. ARTICLE VIII – DEVELOPMENT STANDARDS

Off-Street Parking and Loading - Applicability

Ordinance Reference: Sec. 83-455.B.3.

Findings and Recommended Action Steps:

Consistent with the applicability standards of other articles of the Zoning Ordinance, it is recommended that the requirement for provision of a parking and loading plan be clarified to incorporate compliance review language, as follows: *“Review for compliance with the standards of this section shall occur during review of the parking and loading plan submitted with an application for a Conditional Use Permit (Article II, Administration), Site Plan approval (Article II), or Zoning Compliance Permit (Article II), whichever occurs first.”* As currently written, while a parking and loading plan is clearly required for all non-residential uses, it is unclear under which application process (or processes) such a plan is to be submitted, only indicating that it *“may be”* subject to site plan approval.

Minimum Number of Off-Street Parking Spaces

Ordinance Reference: Table 83-455(D)(1)

Findings and Recommended Action Steps:

The minimum parking requirement for eating and drinking establishments may result in the “over parking” of such uses. The current requirement is based on the gross floor area of the establishment. As such, parking is being required for space that is occupied by storage and equipment – uses that do not generate parking demand – in turn, potentially inflating parking calculations. As an alternative, it is recommended that the parking requirement for such uses be based on the number of seats in the dining area and/or square footage of customer space (i.e. ordering area, self-serve area), if carry-out is a component of the restaurant use.

Stacking Spaces for Drive-through and Related Uses

Ordinance Reference: Figure 83-455(H)

Findings and Recommended Action Steps:

It is noted that the figure illustrating the configuration of required stacking spaces for a drive-through restaurant is not consistent with the table specifying minimum requirements for such spaces. Specifically, the table states that the minimum number of stacking spaces for a drive-through restaurant is measured from the “order box,” but the illustration shows all of the stacking spaces located between the pick-up window and menu board (i.e. order box). To avoid confusion in administration of this requirement, the illustration should be corrected to show the required four (4) stacking spaces extending from the menu board, in addition to the four (4)

stacking spaces required between the pick-up window and order box. Moreover, the “menu board” label should be changed to include the term “order box” to ensure consistency in terminology.

Landscaping and Buffers - Terminology

Ordinance Reference: Sec. 83-461.C.2.4.; Sec. 83-461.D.3.b)(iii); Sec. 83-461.D.4.a)(iv)

Findings and Recommended Action Steps:

The term “groundcover” is referenced in various provisions but is not defined. To avoid confusion in administration, it is recommended that a definition of this term be added to the ordinance.

Perimeter Buffers

Findings and Recommended Action Steps:

As noted in the review of building setback requirements, the current ordinance places the burden of impact mitigation exclusively on the owners of industrially zoned properties. While a 150’ building setback and Type C Buffer are required on an industrial property when it develops adjacent to agriculturally or residentially zoned land, no buffering is required on a residential property when it is developed adjacent to an industrially zoned property. To create a more equitable development context, it is recommended that the perimeter buffer requirements be amended to require buffer provisions on residentially or agriculturally zoned properties when developed with residential uses. The following revisions to the perimeter buffer requirements are recommended:

- **Applicability**

Ordinance Reference: Section 83-461.E.2.

Perimeter buffers are currently required solely to separate development from a “less intense existing use” or “less intense zoning district” on abutting land. This provision should be clarified to stipulate that such buffers will also be required when a residential use is proposed adjacent to industrially zoned and/or used land.

- **Buffer Types**

Ordinance Reference: Table 83-461.E.3.

The Type C Buffer is required on an industrial property when developed adjacent to an existing residential use or zoning district permitting residential uses. Said buffer is currently required within the 150’ building setback. As noted previously, it is recommended that the building setback on industrially zoned properties be reduced and impact mitigation be achieved through refinements to applicable buffer requirements. To facilitate this objective, the following changes to the Type C Buffer options are suggested:

- **Option 1:** Increase buffer width from 30' to 50' AND permit inclusion of earthen berm at least 6 feet in height as an alternative to wall, fence, or solid hedgerow. Allow waiver of 6' opaque element (fence, wall, hedgerow, or berm) if such element is already provided within buffer on adjoining property.
- **Option 2:** Increase buffer width from 65' to 75'.
- **Buffer Type Application**
Ordinance Reference: Table 83-461.E.4.
 No buffering is currently required when residential development is proposed on either residentially or agriculturally zoned property abutting industrially zoned land. In addition to the suggested refinements to the Type C Buffer options noted above, it is recommended that a Type C Buffer be required when a residential land use is proposed adjacent to an industrial use or animal confinement facility, or when the proposed residential land use abuts vacant land zoned for said uses.

Fences and Walls - Appearance: Customary Materials

Ordinance Reference: Section 83-466.F.1.

Findings and Recommended Action Steps:

It is recommended that engineered wood/wood-plastic composites be included as a permitted fence material to enable a low-maintenance screening alternative. Such fencing material is marketed under various brand names, such as Trex and TimberTech, and generally is more resilient and cost-effective over the long term than traditional wood or metal materials. The suggested addition to permitted material options is primarily intended to expand the fencing alternatives available to commercial and industrial uses, although such fencing may also be appropriate for residential and/or agricultural applications.

Exterior Lighting

Ordinance Reference: Sec. 83-469.E.2.

Findings and Recommended Action Steps:

To ensure safety and security of customers and employees, some commercial and industrial users desire greater on-site illumination than the level currently permitted by ordinance for parking areas, loading areas, sales areas, and display areas. It is recommended that consideration be given to increasing the average horizontal illumination level at grade from 2.5 foot-candles to 5.0 foot-candles to permit sufficient flexibility to accommodate such lighting requirements. Given other standards applicable to exterior lighting - such as shielding, focused lighting, spillover light, and mounting height – it is expected that the suggested increase in average horizontal illumination could occur without detrimental impact on night sky conditions.

Farmland Compatibility Standards - Agricultural Buffer

Ordinance Reference: Sec. 83-485.C.1.

Findings and Recommended Action Steps:

It is recommended that the agricultural buffer applicable to commercial and industrial uses be consistent with the buffer type revisions outlined elsewhere in this report. Such consistency will provide greater predictability for commercial and industrial users, as well as improved flexibility in site design and utilization. Specifically, it is suggested that a Type C Buffer be provided adjacent to land zoned Agricultural-20 (A-20), Agricultural-10 (A-10), and Agricultural/Animal Confinement (A-C), which will be a minimum of 50' feet in width if revised as recommended. Coupled with the required landscaping and other screening elements, the width of the Type C Buffer should be sufficient to mitigate potential impacts of commercial and industrial uses on active farming operations. It is noted that the buffer width applicable to residential development adjoining active farming operations is not recommended to change. To facilitate ease of administration, it is further recommended that the Agricultural Buffer be cross-referenced, or otherwise incorporated into the Landscaping and Buffer provisions of the ordinance, and vice versa.

Section 5: Goals, Objectives, & Performance Measures

Vision: *Powhatan is a pro-business economy that utilizes all available tools to attract investment and create jobs to encourage a strong, robust, and diverse economy that meets the needs of our citizens while maintaining our rural character.*

Mission: *To enhance the fiscal strength and vitality of Powhatan County by increasing quality employment and private sector investment opportunities.*

Goal 1: Provide guidance and leadership that provides for a healthy balance of commercial, industrial, and residential growth within the County.

Objectives:

1. Cultivate positive relationships with government agencies, education partners, workforce development organizations, Powhatan Chamber of Commerce, local developers, real estate professionals, and key stakeholders who support the County's economic development efforts.
2. Promote Powhatan as an attractive business location through corresponding development and taxation policies.
3. Provide dedicated resources that strengthen the County's focus on economic development activities.

Performance Measures:

- Total business tax revenues (i.e. commercial/industrial real estate; business personal property, M&T) as a percentage of total local revenues (Reported Annually)
- Total sales tax revenue (Reported Quarterly)
- Commercial/Agricultural/Residential Real Estate Values (Reported Annually)
- "Reactivate" the Powhatan County Economic Development Authority for regularly scheduled meetings (Reported Annually)

Goal 2: Develop and support programs, processes and activities that encourage the expansion and location of sustainable businesses in the County.

Objectives:

1. Identify and implement ways to streamline and improve the County's development review policies and procedures.

2. Provide staff assistance to guide businesses through County development processes.
3. Establish a formal Business Visitation Program that considers staff resources, potential volunteers and/or outsourcing.
4. Develop and implement Technology Zones attractive to targeted business.
5. Establish and adopt a formal Incentives Policy and qualifying criteria.

Performance Measures:

- Establishment of Economic Development and Tourism websites (Reported upon completion)
- Timeframes for approval of zoning cases, site plans, and building permits (Reported Quarterly)
- Number and value of commercial and residential building permits (Reported Quarterly)
- Customer satisfaction (point of service) monitoring/survey (Reported Annually)
- Development of online process for permit application and inspections completed within 12 months (Reported upon completion)
- Number of jobs created/capital investment by new and existing companies (Reported Annually)
- Utilization of County Incentive Programs (e.g. number/value of awards) (Reported Annually)

Goal 3: Encourage the development of quality “product” and associated infrastructure that is attractive to business and industry.

Objectives:

1. Develop and promote programs and incentives to stimulate new development activities.
2. Continue to monitor and/or modify design standards outlined in the County’s Zoning Ordinance to ensure clarity of requirements and cost-effective implementation.
3. Maintain regular and open communication with members of the Development Community to gain input regarding policy changes, processes, fee adjustments, etc.
4. Explore partnerships and sharing of infrastructure costs with area developers that help meet the County’s long-term economic development goals.
5. Consider alternative systems (i.e. water/wastewater) to provide community-based utility services in areas targeted for development activity.
6. Engage fiber and telecommunication service providers to define short and long-range plans for enhancing the County’s broadband capabilities.

Performance Measures:

- Establishment of Quarterly Development Meetings (Reported upon completion)
- Number of attendees/participants in Quarterly Development Meetings (Reported Annually)
- Board of Supervisors adoption of PPEA/PPTA policy and process (Reported upon completion)
- Number of public/private projects undertaken (Reported Annually)

Goal 4: Seek to maximize natural, historic, and agricultural assets to create growth and revenue-generating opportunities in the County.

Objectives:

1. Encourage growth in agricultural operations by assisting local farmers with grant opportunities (e.g. AFID, USDA).
2. Pursue the development of a local agriculture and tourism (heritage) center that provides entrepreneurial (start-up) assistance and associated resources (e.g. farming incubator) with related partners (i.e. Farm Bureau, Extension Services, Monacan Soil & Water Conservation District, Department of Forestry).
3. Work with private sector partners to create lodging options in the County.
4. Develop and implement a Tourism Zone.
5. Explore Transient Occupancy (TO) & Meals Tax options for Powhatan.

Performance Measures:

- Market value of products sold per acre of farmland (as reported by Census of Agriculture data from Virginia Tech Cooperative Extension) (Reported Annually)
- Tourism website up and running by June 30, 2016 (Reported upon completion)
- Establishment of a tourism “branding” campaign during 2016, kicking off with a community meeting in Spring of 2016 (Reported upon completion)
- Identification of a site or building that can be used for Agribusiness/Tourism Center (Reported upon completion)

Section 6: Key Strategies, Recommendations & Implementation Plan

The true success and effectiveness of any plan lies with its implementation; thus, in order for Powhatan County to realize the broader Goals and Objectives outlined in the Economic Development Strategic Plan, a number of specific recommendations and strategies have been developed. Given the extent of recommendations and limited resources required for implementation, the table below is provided to aid County leaders in defining priorities and identifying required resources and action items to advance the Plan.

The proposed Implementation Timelines are defined as follows and should be pursued accordingly to ensure success of the overall Plan and the County’s Economic Development & Tourism efforts:

- Quick Fix: achievable in six (6) months or less
- Phase 1: achievable within 6-12 months
- Phase 2: achievable within 1-2 years
- Phase 3: strategy can/should be implemented within 2-5 years

Additionally, Resources or Actions Required are broadly defined in the following manner:

- Policy or Ordinance Change(s)
- Staff and/or Funding Resources
- Additional Study/Evaluation
- External Partners (include private sector, agriculture groups, State agencies, etc.)

ECONOMIC DEVELOPMENT		
Key Strategies/Recommendations	Implementation Timeline	Resources or Actions Required
1) Employment composition is not well-diversified so efforts should be made to <u>increase private sector businesses, especially light manufacturing or technology-related companies</u> such as software and applications development or other knowledge-based industries.	Quick Fix	Staff

<p>2) Given the number of Professional, Scientific, and Technical Services (PSTS) companies already operating in Powhatan, along with wage levels on par with averages for the Richmond MSA, the County is well-positioned for growth in this sector. Opportunities can be further enhanced with the <u>establishment of a Technology Zone, accelerated depreciation schedules for computer equipment, and promoting the benefit of no BPOL in Powhatan.</u></p>	Quick Fix	Staff; Policy or Ordinance Change(s)
<p>3) Given existing amenities and available land in the County, <u>more aggressively pursue activities associated with the recreational industry.</u></p>	Phase 1	Staff/Funding
<p>4) By <u>implementing programs such as Technology Zones and modifying the County’s tax structure,</u> Powhatan can still attract new companies in the manufacturing sector – particularly food and beverage producers that could complement potential growth in the County’s agribusiness industry.</p>	Phase 1	Policy or Ordinance Change(s)
<p>5) <u>Promoting no BPOL or Merchants’ Capital tax</u> will help to attract logistics and warehousing operations, as well as additional business and professional services companies to the area.</p>	Quick Fix	Staff
<p>6) <u>Provide dedicated staff and resources, either through contractual services or creation of FTE’s, to coordinate essential functions of the County’s Economic Development program.</u> These functions would, at a minimum, include establishment of a formal business visitation</p>	Phase 1	Staff/Funding

program (BRE), maintenance of the available properties database, and coordination of business attraction activities with the Virginia Economic Development Partnership (VEDP).		
7) <u>Establish and maintain an independent data-rich Economic Development website</u> to aid interested companies and site location consultants in learning about Powhatan County.	Quick Fix (already in progress)	Staff/Funding
8) <u>Explore opportunities with willing landowners to secure control of properties</u> for future employment centers, utilizing the powers of the Economic Development Authority (EDA).	Phase 2	Funding (Note: contractual control of properties may initially be achieved without funding)
9) <u>Consider using the EDA to help in financing critical infrastructure improvements to the County's broadband capacity.</u>	Phase 1	Funding; Additional Study/Evaluation; External Partners
10) <u>Consider the creation of a local incentive policy, including qualifying criteria,</u> particularly so the County can pursue State incentives where a local match is required (e.g. Commonwealth's Opportunity Fund).	Quick Fix	Policy or Ordinance Change(s)
11) The County should <u>establish a formal business visitation program</u> in order to identify business concerns, as well as company plans for expansion within or outside the County. The program will also provide a mechanism for obtaining ongoing feedback from area business, helping to identify shared issues that can threaten the County's overall business base.	Phase 1	Staff/Funding

TOURISM & AGRIBUSINESS		
Key Strategies/Recommendations	Implementation Timeline	Resources or Actions Required
1) <u>Agribusiness and Tourism recruitment and revenue-generating opportunities are best centered on agriculture, equine services, events, river and State park attributes.</u>	Quick Fix	Staff/Funding; External Partners
2) <u>Develop marketing plan</u> to include branding, brochures, & Visitor Guide for statewide distribution.	Quick Fix	Funding
3) <u>Acquire the www.visitpowhatan.com domain name</u> to promote activities, events, and other reasons to visit Powhatan.	Quick Fix (already in progress)	Staff/Funding; External Partners
4) <u>Create and maintain new tourism-focused website</u> , migrating over existing information with improvements and enhancements that include: visitor-friendly categories, location information including maps, pictures, and contact information.	Quick Fix (already in progress)	Staff/Funding
5) <u>Upgrade calendar information</u> to include bike race routes, special events, etc.	Quick Fix	Staff
6) <u>Update the www.virginia.org site managed by the Virginia Tourism Corporation (VTC)</u> to reflect accurate Powhatan business listings and events.	Quick Fix	Staff
7) <u>Identify opportunities to assist new or expanding agribusiness operations through the Agriculture Forestry Industries Development (AFID) grant program.</u>	Phase 1	Staff; External Partners
8) Actively explore opportunities through the Virginia Department of Agriculture and Consumer	Phase 1	Staff; External Partners

Services (VDACS) Division to enhance agriculture-focused marketing strategies, including <u>pursuit of an AFID Planning Grant to develop a detailed Agricultural Strategic Plan.</u>		
9) <u>Ensure maximum flexibility in County ordinances</u> to encourage agricultural revenue streams related to various farm-based experiences: “pick-your-own” activities, pumpkin patches, hayrides, corn mazes, chef table events, etc.	Phase 1	Policy or Ordinance Change (s)
10) <u>Provide designated staffing or enlist contract services to help in coordinating local activities and events</u> with the Powhatan Chamber of Commerce, including implementation of future Agribusiness and Tourism initiatives such as outdoor festivals and competitions at Powhatan State Park.	Phase 1	Staff
11) <u>Develop and promote unique experiences for Powhatan:</u> Food Trail, Farm-Table-Chef-Horses events, “Glamping,” Culinary Experiences, Farm Pizza, Historic Powhatan Bike Tour. The County can add value of marketing products.	Phase 2	Staff/Funding
12) <u>Pursue public-private partnerships with State organizations (i.e. Extension Service, Virginia Tech, Virginia State University) and local landowners and farmers to establish “farming incubators” and “generational farming” programs.</u>	Phase 2	Staff/Funding
13) <u>Complete an analysis on potential establishment of Transient Occupancy and Meals Taxes</u> for Powhatan – two common revenue sources that	Phase 3	Additional Study/Evaluation

can be generated by those other than local residents – and begin pertinent dialogue with the County’s legislative delegation.		
14) <u>Reinvigorate the Agriculture Committee or establish an Agribusiness Council</u> to provide guidance and assistance in advancing opportunities for Powhatan, including local food hubs, breweries, wineries and other agricultural-based initiatives.	Phase 1	Staff
15) <u>Evaluate incentive programs, such as the creation of Tourism Zones</u> , as a means of building the County’s tourism infrastructure (e.g. hotels).	Phase 3	Additional Study/Evaluation
INFRASTRUCTURE: TRANSPORTATION		
Key Strategies/Recommendations	Implementation Timeline	Resources or Actions Required
1) <u>Consider adopting VDOT standards or providing a more gradual tiered classification system.</u>	Quick Fix	Policy or Ordinance Change (s)
2) Complete the Rt. 60 Corridor East Special Area Plan (SAP) and implement the SAP recommendations.	Phase 1 (already in progress)	Staff/Funding; External Partners
3) Initiate and prepare a Rt. 711 Corridor East SAP, similar in nature to the Rt. 60 Corridor East SAP.	Phase 2	Staff/Funding; External Partners
4) Prepare a full Rt. 711 Corridor Study to identify a long-term strategy for development and access which protects the rural character while improving safety and capacity, balanced with enhanced access to historical features and other destinations in the corridor, as well as the James River.	Phase 3	Staff/Funding; Additional Study/Evaluation; External Partners

<p>5) Prepare a Countywide bicycle, pedestrian, and blueways plan to update the route, policy, planning and other recommendations of the 2004 Richmond Regional Bicycle and Pedestrian Plan, and integrate multimodal connectivity with preserved and enhanced access to the James River and Appomattox River.</p>	<p>Phase 3</p>	<p>Staff/Funding; External Partners</p>
<p>6) Conduct a review and update of the County's Access Management Standards, with consideration of more closely following VDOT's Access Management Standards as summarized in Appendix F of the VDOT Road Design Manual; adopt the updated standards into the County's Comprehensive Plan.</p>	<p>Phase 1</p>	<p>Additional Study/Evaluation</p>
<p>7) Conduct an industrial access study of railroad accessibility along the existing Norfolk Southern right-of-way and prepare an action plan to enhance access and recruit businesses, either through development of a business park or proactive land acquisition for targeted users.</p>	<p>Phase 3</p>	<p>Additional Study/Evaluation; External Partners</p>
<p>8) <u>Consider further promoting parallel east-west roadways and inter-parcel connectivity between developments to minimize driveway-turning movements along major streets.</u> This can be accomplished through ordinance changes, establishment of HCOD's (i.e. like King George County's Highway Corridor Overlay Districts (HCODs) along Route 3 and 301) and continued application of VDOT Access Management guidelines and enhancement of the current County Subdivision Ordinance.</p>	<p>Phase 1</p>	<p>Policy or Ordinance Change (s)</p>

9) <u>Preserve and enhance the County's river access in a responsible manner, including implementation of interconnections</u> between river access points, suitable roadways, and bicycle/pedestrian facilities to achieve synergies that will maximize tourism potential.	Phase 2	Policy or Ordinance Change (s)
10) <u>Leverage Powhatan State Park</u> , using it as a catalyst for additional trail and riverfront improvements across the County.	Phase 2	Additional Study/Evaluation; External Partners
11) <u>Conduct an assessment of options to improve railroad-highway connectivity.</u>	Phase 3	Additional Study/Evaluation
12) As economic activity increases in the County, <u>periodically evaluate the development of a local general aviation airport as a long-term planning goal</u> to further support and foster the County's economic development goals, perhaps even as a regional initiative.	Phase 3	Additional Study/Evaluation
INFRASTRUCTURE: WATER & WASTEWATER		
Key Strategies/Recommendations		
	Implementation Timeline	Resources or Actions Required
1) <u>The County should keep an open mind to accepting community-based systems</u> as a means of encouraging smart growth.	Phase 1	Policy or Ordinance Change (s)
2) <u>Pursue grant programs available through the Virginia Department of Health and the Virginia Department of Housing and Community Development</u> to assist with feasibility studies for alternative systems.	Phase 2	Staff; External Partners
3) <u>Consider using the Economic Development Authority to help with financing of community-based systems</u> in areas of the County where	Phase 3	Additional Study/Evaluation

business, tourism, and agribusiness activities are desired.		
INFRASTRUCTURE: FRANCHISE UTILITIES		
Key Strategies/Recommendations	Implementation Timeline	Resources or Actions Required
1) <u>Maintain dialogue with DVP to plan service extensions and redundant power</u> as business parks or other large-scale development opportunities are considered.	Phase 1	Additional Study/Evaluation; External Partners
2) As development opportunities are identified, <u>undertake a comprehensive study to determine how natural gas services can be obtained and at what cost,</u> as the availability of natural gas will increase the County's potential for manufacturing operations.	Phase 3	Additional Study/Evaluation
3) <u>Engage Columbia Gas to develop planning for an extension of natural gas service westward along Route 60.</u>	Phase 1	Additional Study/Evaluation
4) <u>Explore the Natural Gas Energy Infrastructure for Economic Development (NEED) Legislation which facilitates the expansion of natural gas infrastructure to support economic development in underserved areas</u> of the Commonwealth, by deferring up-front cost for recovery through rates.	Phase 1	Additional Study/Evaluation
5) <u>Begin discussions with Mid-Atlantic Broadband and/or a specialized consultant to perform detailed due diligence</u> relative to existing broadband infrastructure and recommendations for improvements to support future land use.	Phase 1	Additional Study/Evaluation; External Partners

6) <u>Consider utilizing the Economic Development Authority to help in financing the extension of “dark fiber”</u> to areas of the County where new business activities are wanted – perhaps in partnership with telecommunications providers and/or MBC.	Phase 2/3	Additional Study/Evaluation; External Partners
DEVELOPMENT PROCESS REVIEW		
Key Strategies/Recommendations	Implementation Timeline	Resources or Actions Required
1) <u>Explore opportunities for additional Commerce Center land use within or near the established UDA’s.</u>	Phase 1	Additional Study/Evaluation; External Partners
2) <u>Consider identifying land to be designated for certain target industries, also establishing incentive programs</u> (e.g. Technology or Tourism Zones) to encourage development in these areas.	Phase 1	Additional Study/Evaluation; External Partners
3) <u>Allow the County’s long-term economic development goals to guide future planning decisions,</u> including the desired residential to commercial/industrial ratio.	Phase 2	Additional Study/Evaluation
4) <u>Institute a formal fast-track process and determine target industries & criteria.</u>	Phase 2	Additional Study/Evaluation
5) <u>Consider consulting with Chesterfield County and other Virginia localities that have successfully implemented streamlined and expedited development review processes.</u>	Phase 1	Additional Study/Evaluation
ZONING ORDINANCE REVIEW		
Key Strategies/Recommendations	Implementation Timeline	Resources or Actions Required
1) <u>The Conditional Use list should be evaluated to determine whether any such uses are instead</u>	Phase 2	Additional Study/Evaluation; Policy or Ordinance Change(s)

<u>appropriate as permitted</u> (“by right”) uses, particularly in the I-1 District.		
2) <u>Performance standards could be added to Article VII to ensure mitigation of any unique impacts of concern.</u>	Phase 1	Policy or Ordinance Change(s)
3) <u>Consider reducing required building setbacks in the industrial districts for all development scenarios</u> , regardless of adjoining zoning district or land use.	Quick Fix (already in progress)	Policy or Ordinance Change(s)
4) <u>Development standards should be revised to ensure impact mitigation is more equitably shared across land use and zoning categories.</u>	Phase 2	Policy or Ordinance Change(s)
5) <u>Consider reducing setback requirements to ensure attainment of the maximum lot coverage on industrially zoned properties</u> , regardless of the adjoining zoning/use.	Quick Fix (already in progress)	Policy or Ordinance Change(s)
6) <u>When industrial properties are located on local/secondary roadways and/or situated within commerce/industrial parks, the reduction of the front parking lot setback from 50’ to 10’ from the road right of way is suggested.</u>	Quick Fix (already in progress)	Policy or Ordinance Change(s)
7) <u>Address the visual impact of parking concerns with intensified landscape planting requirements</u> or the addition of a parking lot buffer standard.	Quick Fix (already in progress)	Policy or Ordinance Change(s)
8) It is recommended that <u>building heights be permitted to increase above 35’ with a corresponding increase in building setback, up to a maximum height of 60’.</u>	Phase 1	Policy or Ordinance Change(s)
9) <u>Increasing the maximum lot coverage to 60% would enable improved flexibility in design,</u>	Phase 1	Policy or Ordinance Change(s)

while also supporting expansion/reconfiguration of established industrial uses over time.		
DEVELOPMENT STANDARDS:		
10) <u>Clarification is needed with respect to off-street parking and loading requirements for all non-residential uses, including the associated permitting process</u> under which an application should be submitted.	Quick Fix	Policy or Ordinance Change(s)
11) <u>Add perimeter buffer requirements to residential or agricultural properties when developed adjacent to industrial use or zoning,</u> including modification of current buffer types.	Quick Fix (already in progress)	Policy or Ordinance Change(s)
12) <u>Consider modifications to screening and exterior lighting requirements.</u>	Quick Fix	Policy or Ordinance Change(s)



Appendices

Appendix A: Community Assessment & Comparative Analysis

Appendix B: Primary Data Points & Detailed Benchmarking Research

Appendix C: Tourism Inventory Map

Appendix D: SWOT

Appendix E: Stakeholder Feedback Summaries

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Appendix A

Community Assessment &
Comparative Analysis

Appendix A

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Community Assessment & Comparative Analysis:

1 INTRODUCTION

A key component of formulating the Economic Development Strategic Plan was a comprehensive community assessment and subsequent comparative analysis of key data points for competing localities. Specifically, recent market statistics were compiled and reviewed for ten localities and compared with the same data for Powhatan County. The comparison localities (from various regions within the Commonwealth) were determined based on similarities in size, composition (e.g. rural, natural amenities), and information provided by the Virginia Economic Development Partnership (VEDP) regarding those communities with whom Powhatan would most likely compete on projects. These localities are: Bedford County, Charles City County, Fauquier County, Fluvanna County, Goochland County, Isle of Wight County, Mecklenburg County, Nelson County, Orange County, and Southampton County. Data was collected and analyzed for all communities and an in-depth analysis was then completed for the top five comparison communities. The top five counties (Fluvanna, Goochland, Nelson, Isle of Wight, and Orange County) were determined based on their comparative strengths to Powhatan's – specifically, proximity to a MSA, population, transportation, industry sectors, etc.

The data points considered in the assessment were based on key location factors defined by the International Economic Development Council (IEDC). The specific data elements that were comparatively reviewed include: population and demographics; labor force (availability, education levels, skill sets); commuting patterns; industry composition, clusters, and major employers; wage levels; operating costs (taxes, land prices, utilities), and living/quality of life. These factors – when considered in conjunction with the technical engineering review of the County – will help to ensure the economic development strategy is aligned with the County's assets.

The community assessment also incorporates valuable feedback from various stakeholder groups, as their perceptions of and experiences in Powhatan can identify areas of "risk," as well as obstacles to successful development and implementation of the County's economic development strategy. Overall, feedback about the County highlighted both its strengths and weaknesses, as summarized in both the Strengths, Weaknesses, Opportunities & Threats (SWOT) table (**Appendix D**) and Stakeholder Feedback Summaries provided in **Appendix E**.

A compilation of all data points and information gathered and evaluated for this project (for Powhatan and benchmarking communities) can be found in **Appendix B**. In addition, an analysis of each of the key data elements is outlined below.

2 POPULATION AND DEMOGRAPHICS

2.1 POPULATION AND POPULATION DENSITY

Powhatan County is one of the smaller communities in the Greater Richmond region when considering population, but it is about the same size in land area as several nearby communities, including its immediate neighbor -- Goochland County. In 2014, Powhatan had an estimated population of 28,706. When contrasted with the comparative communities, this is about the same size as Fluvanna (25,970), about 20% smaller than Orange (34,689) and Isle of Wight Counties (36,172), but approximately 25% larger than Goochland (21,703) and 50% larger than Nelson County (14,789).

Of these communities, Powhatan has the greatest population density (108.6), which is higher than all of the comparison communities except Isle of Wight. Fluvanna and Goochland are a bit less densely populated (90.8 and 76.9 respectively), and Nelson is the least densely populated (31.4).

Population over Time

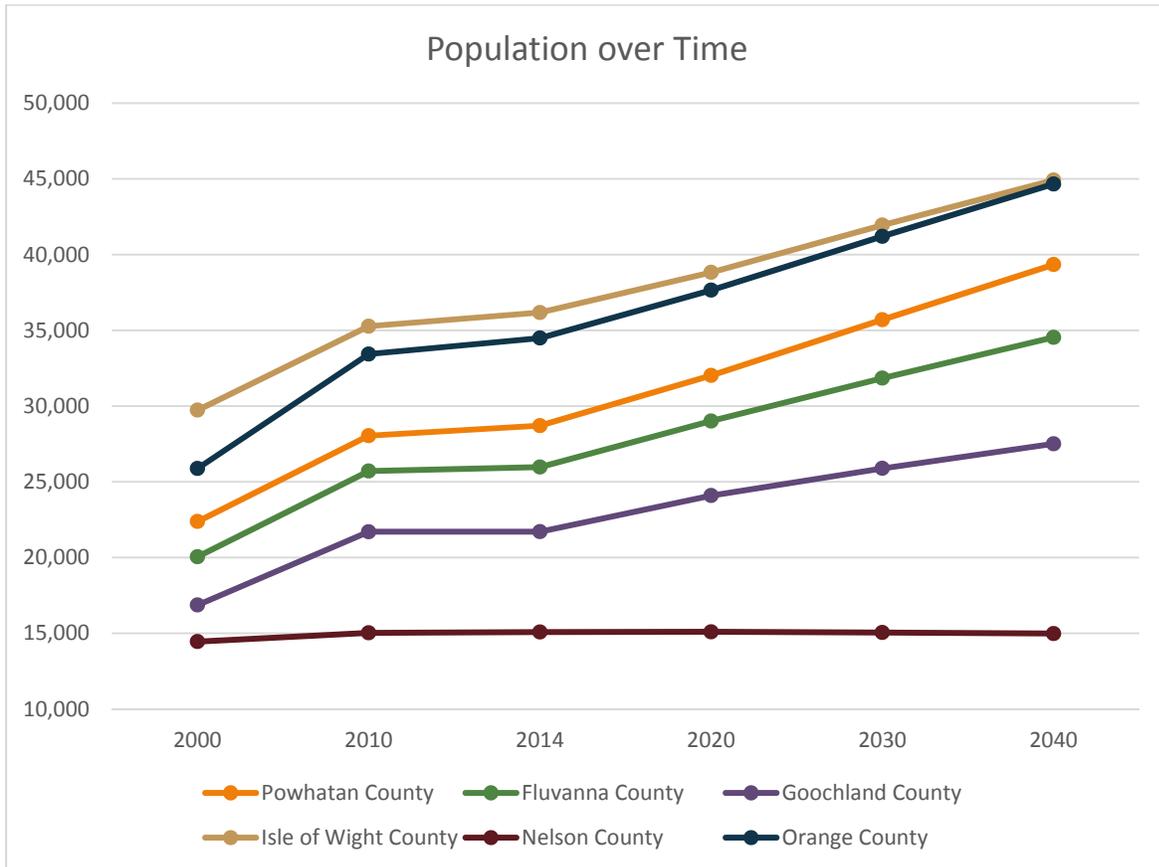
	Powhatan County	Fluvanna County	Goochland County	Isle of Wight County	Nelson County	Orange County
2014 (July 1, Estimate, Weldon Cooper)	28,706	25,970	21,703	36,172	15,074	34,487
2010 (April 1, estimates base)	28,046	25,691	21,717	35,270	15,020	33,481
2000	22,377	20,047	16,863	29,728	14,445	25,881
1990	15,328	12,429	14,163	25,053	12,778	21,421
1980	13,062	10,244	11,761	21,603	12,204	18,063
April 1, 2010 - July 1, 2014 % change	2.4%	1.1%	-0.1%	2.6%	0.4%	3.0%
2000 - July 1, 2014 % change	28.3%	29.5%	28.7%	21.7%	4.4%	33.3%
Projections						
2020	32,019	29,009	24,088	38,828	15,091	37,648
2030	35,702	31,839	25,886	41,946	15,044	41,207
2040	39,343	34,537	27,505	44,922	14,976	44,662
Land Area / Density						
Land Area (in sq. miles)	260.2	286	281.4	315.6	470.9	340.8
Population Density ('13)	108.6	90.8	76.9	113	31.4	101.8

Source: U.S. Census Bureau, American Community Survey, 5 Year Estimates (2009-2013), Weldon Cooper Center for Public Service (Estimates, Projections), Statsamerica.org

2.2 POPULATION GROWTH

Powhatan has seen a healthy population growth in the last 15 years (28.3%), which is equal to the growth experienced in Fluvanna and Goochland, slightly higher than in Isle of Wight (21.7%), much higher than in Nelson (4.4%), but lower than in Orange (33.3%). It is noteworthy that Powhatan's growth between 2010 and 2014 (2.4%) is higher than in Fluvanna (1.1%) and

significantly greater than in neighboring Goochland, which has seen a negative growth during that timeframe (-0.1%).



Source: U.S. Census Bureau, Weldon Cooper Center for Public Service

In Powhatan County, population growth is composed of both a natural increase in its population (46 more births than deaths in 2012/13) and new residents moving into the County (net domestic migration of 61 in 2012/13). In the comparable communities - except for Orange which has seen much greater natural (97) and net domestic migration (344) increases - either the natural increase was negative (as in Goochland, Isle of Wight, and Nelson) and net domestic migration was positive or vice versa (Fluvanna County).

Components of Population Change

	Powhatan County	Fluvanna County	Goochland County	Isle of Wight County	Nelson County	Orange County
Net Domestic Migration (Δ 2012/13)	61	-123	278	249	28	344
Net International Migration (Δ 2012/13)	-1	15	0	23	3	42
Natural Increase (births - deaths)	46	102	-6	-26	-22	97
Births	235	271	150	312	126	401
Deaths	189	169	156	338	148	304

Source: US Census Bureau, Statsamerica.org

Powhatan County continues to attract new residents. In 2013, 8.5% (2,383) of Powhatan's residents had moved into the community in the previous year; only Orange tops this figure (2,931 / 8.7% of residents). The other four communities also saw an increase in their new residents, with Nelson and Fluvanna's new residents making up about 6.5% of their population, and Goochland and Isle of Wight's percentages being slightly lower than 6% of their respective populations. Interestingly, a large percentage of new residents moved into Powhatan from other Virginia communities (1,845/6.6% of residents), which is the second highest number of new residents of the six communities considered (after Orange 2,847/7.4%), and significantly larger than Fluvanna (1,297), Isle of Wight (1,322), Goochland (882), and Nelson (752). Powhatan also attracted the second most new residents from different states (521/1.9%), which is slightly less than Isle of Wight (592) but much higher than Fluvanna (374), Goochland (307), Orange (381), and Nelson (188).

Geographic Mobility

	Powhatan County	Fluvanna County	Goochland County	Isle of Wight County	Nelson County	Orange County
Total	27,901	25,593	21,409	34,959	14,791	33,672
Same house 1 year ago	24,941	23,355	19,811	31,812	13,101	29,089
Moved within same county	577	567	397	1,077	750	1,652
Moved from different county within same state	1,845	1,297	882	1,322	752	2,487
Moved from different state	521	374	307	592	188	381
Moved from abroad	17	0	12	156	0	63

Source: US Census Bureau, American Community Survey, 5 Year Estimates (2009-2013)

2.3 POPULATION BY AGE AND GENDER

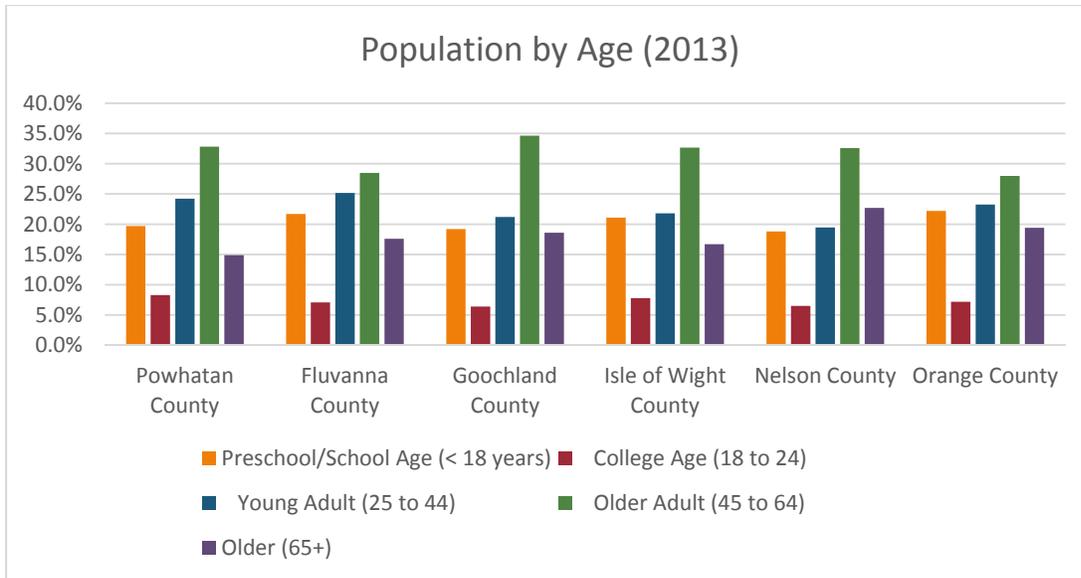
The median age in Powhatan is approximately 43, which is the same as in Orange, comparable to Fluvanna (42), but lower than in Isle of Wight (44), Goochland (46), and Nelson (48). The percentage of school-age residents in Powhatan (19.7%) is similar to its neighboring community, Goochland, slightly higher than in Nelson (18.8%), but lower than in Isle of Wight, Fluvanna, and Orange (21.1% - 22.2%). Surprisingly, the percentage of older (65+) residents is significantly lower in Powhatan (14.9%) than in the other communities (16.7% - 22.7%), pointing to a lower number of retirees in Powhatan. Powhatan's percentage of working age residents (18-64), is the highest (65.3%), giving it an advantage over other communities ranging 58.4% - 62.2%. However, residents aged 45-64, make up about a third of the total County population, which is slightly less than in Goochland, the same as in Isle of Wight and Nelson, but higher than in Fluvanna and Orange (about 28%). While these residents are currently still in the workforce, a significant number of retiring workers needs to be considered in the coming years, as this will decrease the County's workforce and, at the same time, increase the retirement population and ensuing demand for health care and related services.

Powhatan's male population is considerably larger (53.8%) than in the other communities (which have close to a 50/50 (or 49/51) distribution) because of the prison population housed in the County. A similar disparity exists in Fluvanna, where the female percentage is 54.3% because of the women's prison located in the County.

Population by Age

	Powhatan County	Fluvanna County	Goochland County	Isle of Wight County	Nelson County	Orange County
Total Population	28,259	25,977	21,626	35,656	14,789	34,689
Preschool (0 to 4)	1,134	1,393	864	1,708	673	2,032
School Age (5 to 17)	4,442	4,246	3,291	5,806	2,108	5,666
College Age (18 to 24)	2,343	1,835	1,380	2,780	960	2,494
Young Adult (25 to 44)	6,844	6,539	4,583	7,771	2,880	8,064
Older Adult (45 to 64)	9,273	7,399	7,489	11,644	4,818	9,704
Older (65 plus)	4,223	4,565	4,019	5,947	3,350	6,729
Percentage						
Preschool (< 5 years)	4.0%	5.4%	4.0%	4.8%	4.6%	5.9%
Preschool/School Age (< 18 years)	19.7%	21.7%	19.2%	21.1%	18.8%	22.2%
College Age/Adult (18-64 years)	65.3%	60.7%	62.2%	62.2%	58.5%	58.4%
<i>College Age (18 to 24)</i>	8.3%	7.1%	6.4%	7.8%	6.5%	7.2%
<i>Young Adult (25 to 44)</i>	24.2%	25.2%	21.2%	21.8%	19.5%	23.2%
<i>Older Adult (45 to 64)</i>	32.8%	28.5%	34.6%	32.7%	32.6%	28.0%
Older (65+)	14.9%	17.60%	18.60%	16.70%	22.70%	19.40%
Other						
Median Age	42.6	41.5	45.8	44.2	47.9	42.7
Male %	53.8%	45.7%	49.6%	48.7%	49.0%	49.1%
Female %	46.2%	54.3%	50.4%	51.3%	51.0%	50.9%

Source: US Census Bureau, American Community Survey, 5 Year Estimates (2009-2013)



Source: US Census Bureau, American Community Survey, 5 Year Estimates (2009-2013)

2.4 HOUSEHOLDS, HOUSING AND INCOME

Powhatan County has 9,544 households, with an average size of 2.61. This is similar to all of the comparative communities except Goochland and Nelson, where households are slightly smaller. Thirty three percent of Powhatan’s households have at least one person under the age of 18. This is the highest percentage of the communities studied, with Nelson having the least number of households with children under the age of 18 (25.5%).

Households

	Powhatan County	Fluvanna County	Goochland County	Isle of Wight County	Nelson County	Orange County
Households (ACS 2009-2013)	9,544	9,462	8,058	13,560	6,404	12,621
Persons per household (2009-2013)	2.61	2.6	2.4	2.59	2.31	2.65
Per Capita Personal Income (PCPI) (2013)	\$47,214	\$41,278	\$73,930	\$45,759	\$45,680	\$38,149
Median household income (2009-2013)	\$76,548	\$68,288	\$80,976	\$63,942	\$48,789	\$60,287
Persons below poverty level, percent (2009-2013)	5.4%	7.1%	5.6%	12.0%	14.2%	12.6%

Source: US Census Bureau

Powhatan also has a high percentage of owner-occupied housing units (88.7%), which is similar to Goochland (90.2%), slightly higher than Fluvanna (85.5%), but much higher than Isle of Wight, Nelson, and Orange County (75-80%), where the number of rental units is greater. Consequently, it is not surprising that more than 95% of these housing units in Powhatan are individual homes. The median value of homes in Powhatan in 2013 was about \$270,000. Housing values in

Goochland were about 25% more expensive, yet less than 10% lower in Isle of Wight, about 15% cheaper in Orange and Fluvanna, and nearly 30% less in Nelson. The median value of homes in Powhatan in 2013 was about \$270,000. – same as in Goochland but much higher than in Fluvanna, Nelson and Orange. The low percentage of 2-or-more-unit structures in Powhatan (1.9%) compared to 7.3% in Isle of Wight, 6.1% in Nelson, and 6.7% in Orange, combined with the high median housing values, point to a limited number of affordable rental housing units in the community. Similarly, Goochland and Fluvanna also have a low percentage of multi-unit structures, posing challenges with the availability of “workforce housing.”

The median household income in Powhatan (\$76,548) is just behind Goochland (\$80,976); however, the median household income in Fluvanna, Isle of Wight, Orange, and Nelson range from 10-35% lower than in Powhatan.

Housing

	Powhatan County	Fluvanna County	Goochland County	Isle of Wight County	Nelson County	Orange County
Housing units, 2013	10,230	10,566	8,760	14,915	9,978	14,779
Housing Tenure						
Owner-occup. housing units	88.7%	85.5%	90.2%	80.6%	75.8%	75.9%
Renter-occup. housing units	11.3%	14.5%	9.8%	19.4%	24.2%	24.1%
Housing Cont.	Powhatan County	Fluvanna County	Goochland County	Isle of Wight County	Nelson County	Orange County
Units in Structure						
1-unit structures	95.1%	93.9%	95.3%	80.9%	78.0%	86.4%
2-or-more-unit structures	1.9%	2.3%	0.9%	7.3%	6.1%	6.7%
Mobile homes and all other types of units	2.9%	3.8%	3.8%	11.8%	15.9%	6.9%
Median value of owner-occupied housing units, 2009-2013	\$269,700	\$225,700	\$338,500	\$249,600	\$192,900	\$230,500
Building permits, 2013	143	84	142	123	52	94
Living in same house 1 year & over, percent, 2009-2013	89.4%	91.3%	92.5%	91.0%	88.6%	86.4%

Source: US Census Bureau, American Community Survey, 5 Year Estimates (2009-2013)

3 LABOR FORCE

3.1 CIVILIAN LABOR FORCE

Overall, labor availability in Powhatan is better than in Fluvanna, Nelson, and Orange, the same as in Goochland, and lower than in Isle of Wight County when looking at labor force totals. Isle of Wight has the largest labor force with 18,903 and an extended labor market of almost 835,000, yet its location relative to a major MSA is not as strong as Powhatan's. Powhatan County's labor force in 2014 was 13,761. Additionally, because of its proximity to the Richmond metro area, the extended labor market increases total labor availability to over 580,000. Given its location, neighboring Goochland County enjoys the same advantage, despite having a smaller labor force of its own. Fluvanna's labor market is about the same size as Powhatan's but, comparatively, its proximity to the smaller Charlottesville MSA puts it at a disadvantage in total labor availability (about 179,000). Nelson's labor force is about half the size of Powhatan's, and its extended labor force totals only about 240,000. Despite the fact that Orange County's labor force is about 20% larger than Powhatan's, its extended labor total (335,000) still doesn't compare to that of Powhatan. Powhatan's labor force participation rate, however, is the third lowest (58.2%) after Nelson and Goochland, and significantly lower than the regional average of 67.1%. Orange and Fluvanna's rates are slightly higher (about 60%) and Isle of Wight County's rate is highest (66.1%). When taking this low rate into consideration, Powhatan's actual labor force availability is much lower, although its median age is 42.6 years – the second lowest of the five comparative communities.

The unemployment rate in Powhatan (4.5% in 2014) has been below the regional average and is lower than all comparable communities but Fluvanna (4.3%). During the last 12 months, it has ranged between 4.0-4.9%; however, Powhatan has a large number of underemployed individuals (1,681 or about 12.2% of its labor force). While the percentage of underemployed is similar to the other communities studied, given the low labor force participation rate, the actual number of underemployed is high in comparison to the number of working adults. Thus, these individuals can provide a solid pipeline of skilled workers, particularly for new industries.

Additionally, according to the Virginia Employment Commission, the pool of potential candidates looking for employment in Powhatan in April 2015 totaled more than 17,000. Of these, more than 60% had more than 10 years of work experience, offering another source of experienced labor.

Another key labor source for Powhatan is the high school, college, and university graduates in the region, totaling more than 40,000 annually.

Labor Force Overview

	Powhatan County	Extended Labor Market	Total Labor Market	Fluvanna County	Goochland County	Isle of Wight County	Nelson County	Orange County
Labor Force (2014)	13,761	568,743	582,504	13,402	10,533	18,903	7,519	16,234
Total Labor Market	582,504			179,077	583,148	834,333	239,507	335,262
Labor Force Participation (2009-2013)	58.2%	67.1%	n/a	60.6%	56.9%	66.2%	57.9%	59.6%
Labor Force Overview Cont.	Powhatan County	Extended Labor Market	Total Labor Market	Fluvanna County	Goochland County	Isle of Wight County	Nelson County	Orange County
Unemployed (2014)	623	29,879	30,502	572	500	996	364	848
Unemployment Rate (2014)	4.5%	5.3%	n/a	4.3%	4.7%	5.3%	4.8%	5.2%
Labor Force (3/2015)	13,681	n/a	n/a	13,578	10,474	18,693	7,583	16,084
Unemployed (3/2015)	605	n/a		556	490	957	347	837
Unemployment Rate (3/2015)	4.4%	4.9%		4.1%	4.7%	5.1%	4.6%	5.2%
Underemployed (3rd Qu. 2014)	1,681	65,313	66,994	1,650	1,340	2,428	897	1,636
Additional Labor Resources	40,583							
<i>High School Graduates Not Continuing (2012-13)</i>	36							
<i>Two-Year College Graduates (Spring 2013)</i>	3,373							
<i>Two-Year College Enrollees (Fall 2013)</i>	28,706							
<i>Other College and University Graduates (Spring 2013)</i>	8,468							
Veterans (2009-2013)	2,390	n/a	n/a	2,283	2,026	4,170	1,327	3,541

Source: Virginia Employment Commission, LAUS; U.S. Census; Virginia Economic Development Partnership (Extended Labor Market data – including all communities surrounding Powhatan County)

3.1.1 Educational Attainment

A substantial portion (85.9%) of the adults 25 and older in Powhatan County have at least a high school diploma, and almost 28% have a Bachelor's degree or higher. Specifically, 8.2% have an Associate Degree, 18.8% a Bachelor, and 8.7% a graduate, professional or doctorate degree. These figures are greater than in Nelson, Isle of Wight, and Orange, comparable to Fluvanna, but significantly lower than Goochland County where 38% of residents have a Bachelor's degree or higher.

Over 57% of Powhatan's 25 years+ population has some post-high school education or a college degree. This is the same as in Fluvanna and Isle of Wight, lower than in Goochland (62.2%) and higher than in Orange and Nelson, once again indicative of a healthy supply of qualified workers for a variety of knowledge-based industries.

Educational Attainment: 2013

	Powhatan County	Fluvanna County	Goochland County	Isle of Wight County	Nelson County	Orange County
High school graduate or higher, % of persons age 25+ (2009-13)	85.9%	85.5%	87.4%	86.1%	80.8%	85.0%
Bachelor's degree or higher, % of persons age 25+ (2009-13)	27.6%	28.8%	38.0%	25.5%	26.7%	22.2%

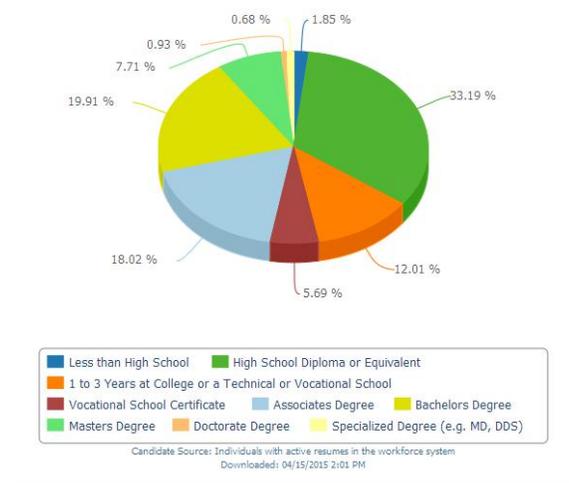
Source: Statsamerica.org, US Census Bureau, American Community Survey, 5 Year Estimates (2009-2013)

Educational Attainment (Detail)	Powhatan County	Fluvanna County	Goochland County	Isle of Wight County	Nelson County	Orange County
Total Population 25 and Older	20,038	18,372	16,011	25,030	11,110	23,951
Less Than 9th Grade	867	883	701	1,325	983	1,167
9th to 12th No Diploma	1,955	1,780	1,318	2,158	1,155	2,434
High School Grad (inc. equiv.)	5,690	5,177	4,047	7,183	3,605	8,144
Some College, No Degree	4,354	3,811	2,846	5,898	1,849	5,400
Associate Degree	1,648	1,428	1,013	2,078	554	1,481
Bachelor's Degree	3,776	3,428	3,595	4,059	1,730	3,382
Graduate, Prof./Doct. Degree	1,748	1,865	2,491	2,329	1,234	1,943
Educational Attainment (as % of Population 25 and Older)						
Total Population 25 and Older	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Less Than 9th Grade	4.3%	4.8%	4.4%	5.3%	8.8%	4.9%
9th to 12th No Diploma	9.8%	9.7%	8.2%	8.6%	10.4%	10.2%
High School Grad (inc. equiv.)	28.4%	28.2%	25.3%	28.7%	32.4%	34.0%
Some College, No Degree	21.7%	20.7%	17.8%	23.6%	16.6%	22.5%
Associate Degree	8.2%	7.8%	6.3%	8.3%	5.0%	6.2%
Bachelor's Degree	18.8%	18.7%	22.5%	16.2%	15.6%	14.1%
Graduate, Prof./Doct. Degree	8.7%	10.2%	15.6%	9.3%	11.1%	8.1%

Source: Statsamerica.org, US Census Bureau, American Community Survey, 5 Year Estimates (2009-2013)

The Virginia Employment Commission's pool of potential candidates looking for employment in Powhatan as of April 2015 further highlights the County's educated labor pool. One third of these candidates had a high school diploma, 18% had a vocational school certificate or attended college for some time, and almost half had an Associate's degree or higher. Further, as previously mentioned, of this pool of candidates, more than 60% had 10 years or more of work experience.

Education Level of Available Candidates
 The graph below shows the education levels of potential candidates in Powhatan County, Virginia on April 14, 2015.



3.1.2 Skill Sets

The Public Administration sector leads the way in Powhatan, employing the largest number of workers (1,572) – likely at the State Corrections Facility located in the County. Construction is a close second (1,233), also leading the way in the number of establishments (199). Educational Services (737), Retail Trade (604), Accommodation and Food Services (438) complete the “Top Five” employment sectors in the County, with higher-paying industries such as Professional, Scientific, and Technical Services (391), Manufacturing (260), and Information (28) making up smaller percentages of total employment. Subsequently, at-place employment opportunities for Powhatan residents are limited, so it is not surprising that almost 70% of County residents out-commute daily.

In looking at the skill sets of current residents, the opportunities for new job creation in Powhatan is evident, particularly when considering the significant number of individuals working outside of the County. Additionally, new employers could also draw from the qualified labor pool from neighboring communities, as discussed previously.

3.1.3 Education and Training Programs

The Greater Richmond region is home to many credible academic institutions, including four universities – Virginia Commonwealth University, Virginia Union University, University of Richmond, and Virginia State University, as well as the two-year schools – John Tyler and J. Sargeant Reynolds Community College – that provide a wide range of programs designed to support a variety of industries. Additionally, the joint workforce development partnership between the two colleges – the Community College Workforce Alliance – will work with companies to design programs to meet their specific needs through non-credit training, custom-designed instruction, consulting, skills assessments and educational programs.

3.2 COMMUTING PATTERNS

As previously mentioned, almost 70% of Powhatan's residents commute out of the County for work – one of the highest percentages of all the communities evaluated. The number of Powhatan workers exported daily is only slightly greater than in Goochland (69%) and Isle of Wight (66.2%), but greater than in Nelson and Orange where only about 60% of residents leave for work opportunities.

Powhatan County workers travel an average of 32.4 minutes to reach their place of employment, with most going to Chesterfield, Henrico, and the City of Richmond.

The commute time for Powhatan residents is comparable to Fluvanna and Nelson residents, higher than for Goochland and Isle of Wight, but lower than in Orange whose residents have the longest travel times of all eleven communities studied.

The number of in-commuters in Powhatan is limited, with the majority coming from Chesterfield and a smaller number from Henrico, the City of Richmond, and Cumberland County. Considering the number of in-commuters is about 80% smaller than the number of out-commuters, and only 28.4% of Powhatan residents enjoy at-place employment, job opportunities in the County seem to be quite limited compared to other communities.

The greater resulting effect of out-commuting, however, is the loss of sales tax revenue that generally occurs from people spending where they work -- particularly at eating establishments, grocery stores, gas stations, and dry cleaners.

Commuting Patterns and Times (2013)

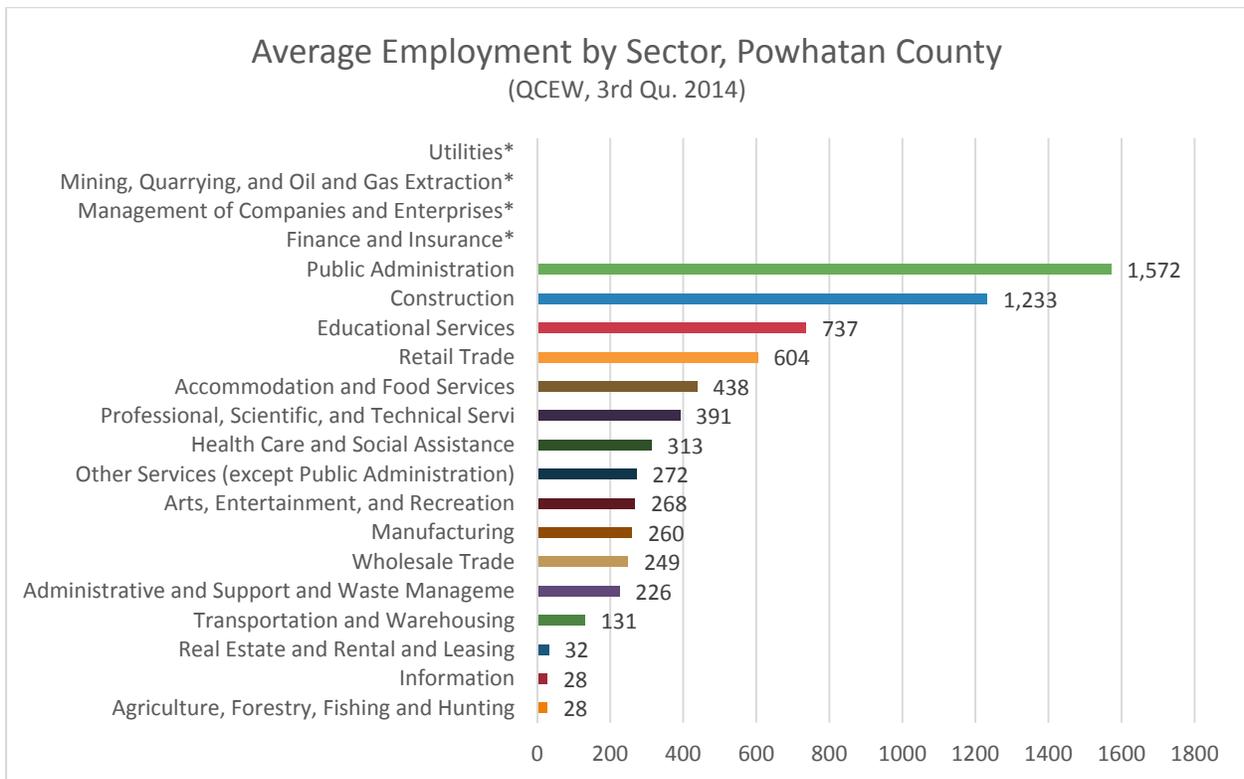
	Powhatan County	Fluvanna County	Goochland County	Isle of Wight County	Nelson County	Orange County
Workers 16 years and over	12,250	11,714	9,460	17,360	6,404	14,299
Place of Work						
Worked in state of residence	98.3%	99.5%	98.4%	99.3%	97.9%	96.4%
Worked in county of residence	28.4%	27.4%	29.5%	33.2%	39.4%	36.2%
Worked outside county of residence	69.9%	72.1%	69.0%	66.2%	58.5%	60.3%
Worked outside state of residence	1.7%	0.5%	1.6%	0.7%	2.1%	3.6%
Travel Time to Work						
Mean travel time to work (minutes)	32.4	33.5	30.1	28.6	33.2	39.9

Source: US Census Bureau, American Community Survey, 5 Year Estimates (2009-2013) (Includes only domestic commuting for workers over 16 years old.)

4 INDUSTRY COMPOSITION, CLUSTERS, AND MAJOR EMPLOYERS

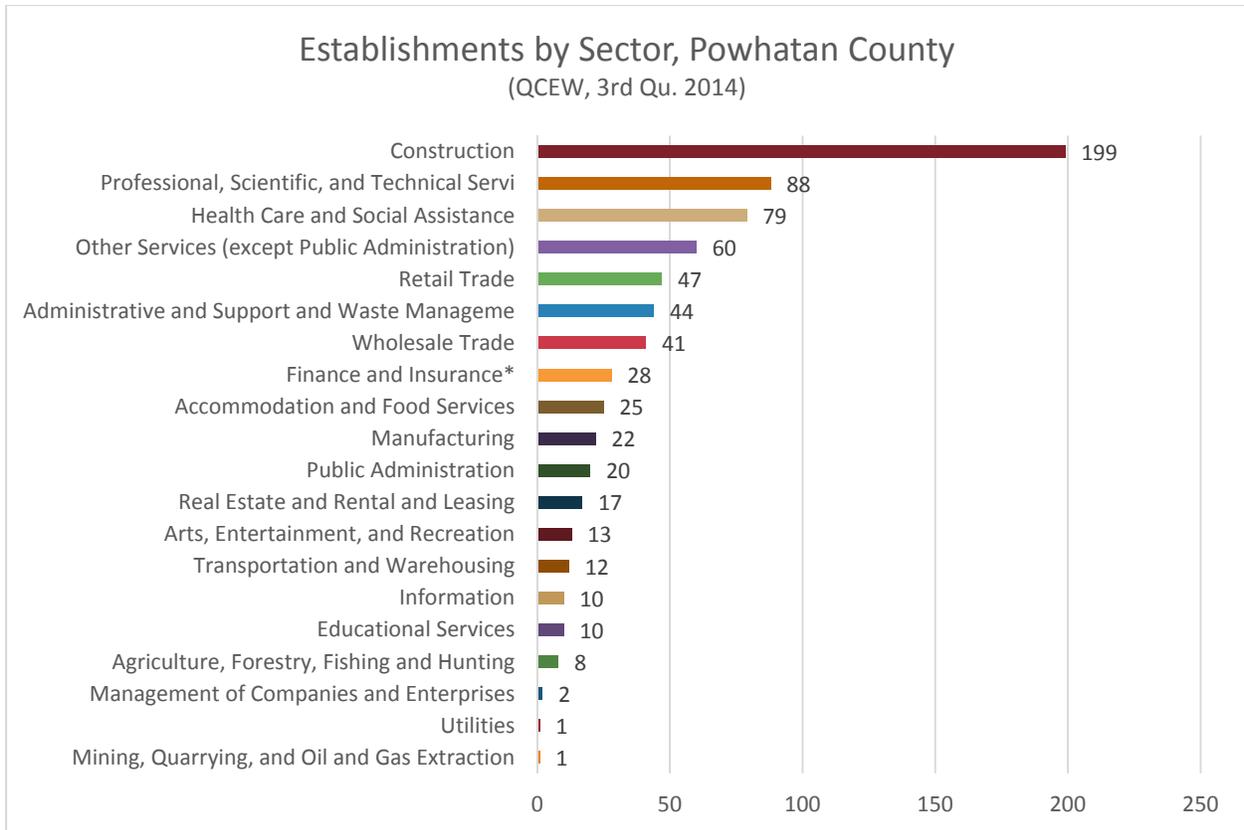
At the end of the third quarter 2014 (the most current data available at the time of this study), total employment in Powhatan County was at 8,038* and distributed across 727 businesses. The two predominant industry sectors (by employment) are Construction and Public Administration. Other major sectors include Educational Services, Retail Trade, Accommodation and Food Services, and Professional, Scientific, and Technical Services (PSTS).

(*The average employment figure for Powhatan is misleading, as the VEC data includes telecommuters employed by Anthem in the County’s employment totals. While official revised data from VEC is not yet available, total employment numbers should be about 1,000 less than state above.)



Source: Virginia Employment Commission / * Data not disclosed

Interestingly, the prevailing sectors by number of establishments do not exactly mirror the dominant employment sectors. While the largest number of entities is still in the Construction sector (199 companies), the other leading sectors vary and include Professional, Scientific, and Technical Services (PSTS) with 88 entities, Health Care and Social Assistance with 79 entities, and Other Services with 60 entities.



Source: Virginia Employment Commission / * Data not disclosed

Powhatan’s industry composition is also driven by small businesses. Of the 727 businesses located in the County, the majority (nearly 81%) employ 10 or fewer individuals, with less than 3% being considered large employers. Since most businesses are comprised of 10 employees or less (even in larger localities such as neighboring Chesterfield), Powhatan’s statistics are not unusual; however, the County should ensure there are adequate support programs for high-growth companies and visit them regularly to make sure they are satisfied and planning to grow in Powhatan – particularly technology businesses that pay higher wages.

Establishments by Employment Level

Employment Level	# of Companies	% of Companies
0-4	488	67.1%
5-9	105	14.4%
10-19	63	8.7%
20-49	51	7.0%
50-99	11	1.5%
100 or more	9	1.2%

Source: Virginia Employment Commission, QCEW, 3rd Quarter 2014

Powhatan Establishments by Employment Size and Industry

	# of Establishment with 0-9 Employees	Total Establishments
Total, All Industries*	593	727
Agriculture, Forestry, Fishing and Hunting	5	8
Mining, Quarrying, and Oil and Gas Extraction	0	1
Utilities	0	1
Construction	171	199
Manufacturing	14	22
Wholesale Trade	36	41
Retail Trade	34	47
Transportation and Warehousing	6	12
Information	10	10
Finance and Insurance*	25	28
Real Estate and Rental and Leasing	15	17
Professional, Scientific, and Technical Serv.	81	88
Management of Companies and Enterprises	0	2
Administrative and Support and Waste Mgmt.	35	44
Educational Services	5	10
Health Care and Social Assistance	68	79
Arts, Entertainment, and Recreation	5	13
Accommodation and Food Services	8	25
Other Services (except Public Administration)	54	60
Public Administration	9	20

Source: Virginia Employment Commission, QCEW, 3rd Quarter 2014

*Number of establishments for Powhatan is incorrect because Anthem is erroneously included as an employer in the county; official revised data from VEC not yet available.

4.1 INDUSTRY COMPARISONS

In analyzing the various industry sectors distributed across the selected localities, the Location Quotient was calculated for each area (by sector) and compared to the Virginia average. The Location Quotient (LQ), while typically applied to employment levels, is a recognized means of quantifying the concentration of a particular industry, cluster, occupation, or demographic group in a region, and is frequently used to help identify unique factors of a given locality or region, in comparison to the state or national average (equal to 1). Thus, a LQ higher than one (1) is considered favorable.

4.1.1 Public Administration (NAICS 92)

Public Administration is Powhatan's largest sector (by employment), providing about 20% (or 1,572) of all jobs in the County. In most communities, employment levels in this sector range between three and five percent of total employment, including Goochland, Isle of Wight, Nelson, and Orange County; however, the State prisons located in Powhatan, Fluvanna, and Southampton County raise employment levels and, thus, location quotients for this sector to 3.2, 1.95, and 3.55 respectively. In fact, the presence of Fluvanna Correctional Center alone accounts for almost 13% of total employment in Fluvanna County. Conversely, Powhatan is home to four government-based employers – the Virginia Department of Juvenile Justice, the Powhatan Correctional Center, the Deep Meadow Correctional Center, and the Powhatan Reception and Classification Center. Each of these operations is noted in the County's Top 10 employers, jointly employing more than 1,250 individuals. While these entities are currently significant contributors to the County's employment base, the risk of future job loss should not be overlooked considering the continued impact of a shrinking State budget on localities.

4.1.2 Construction (NAICS 23)

Construction is a dominant sector in Powhatan. It is the largest sector by both number of establishments (199 / 27.4%) and employment (15% / 1,233). Eleven companies in this sector, including Colony Construction, Layman & Son Enterprises LLC and Mid Atlantic Steel Erecto Inc. are among the Top 50 Largest Employers in the County. Powhatan's construction LQ of 2.95 is the highest of the six communities studied. While the LQs for Goochland, Fluvanna, and Nelson are still greater than 1, Orange and Isle of Wight have LQs lower than 1. This translates into employment levels that are significantly lower; ranging around 4% for Isle of Wight and Orange, 7% for Nelson and Goochland, and 10% for Fluvanna. When looking at total employment figures, the difference between the comparable communities and Powhatan is similar except for Goochland, which also has more than 1,000 workers in the construction sector.

Powhatan also has more than twice the number of construction companies than Fluvanna, Isle of Wight, and Nelson, and about 80 more companies than Goochland and Orange County.

4.1.3 Professional, Scientific & Technical Services (NAICS 54)

The Professional, Scientific & Technical Services (PSTS) sector is Powhatan's third largest sector by number of establishments (88 / 12.1%), although it only comprises about 5% of County employment. Among the larger employers in the PSTS sector are Pietech, Inc., Computer Upgrade Kings, and Sanair Technologies Laboratory. Only Goochland (88) and Orange County (74) have similarly high numbers of employers in this sector while the other communities have fewer. Of the localities studied, Powhatan companies also employ the largest number of individuals (391), except for Goochland, which employs 479 individuals in the PSTS sector. The County has a relatively low LQ 0.39, but it is still the highest of the comparable communities (ranging 0.17-0.36).

Given the number of PSTS companies already operating in Powhatan, potential growth is possible, particularly in conjunction with the establishment of a Technology Zone and the benefit of no BPOL in the community.

4.1.4 Health Care & Social Assistance (NAICS 79)

The Health Care and Social Assistance (HCSA) sector is prominent in Powhatan because it makes up almost 11% of the total number of establishments (79). This is comparable to both Goochland and Isle of Wight, but Nelson and Orange County have about twice the number of HCSA enterprises and Fluvanna, about 40% more than Powhatan; however, employment levels in this sector are lowest in Powhatan at 313, accounting for the lower LQ of 0.32. Employment levels in the other communities range between 4.6% in Goochland and 10.4% in Orange County (LQs of 0.42-0.81).

4.1.5 Educational Services (NAICS 61)

Employment in the Educational Services sector in Powhatan (737) is comparable to Goochland (690), but lower than in Orange (1,202) where Germanna Community College's main campus is located. That aside, Powhatan's employment in this sector comprises more than 9% of County employment, compared to 5% in Goochland and 13% in Orange. This translates into a LQ for Powhatan that is only slightly above average (1.09).

It may be of interest to note that Goochland County's School Board employment (250-499) is lower than Powhatan's (500-999), and that Goochland also houses both the Virginia Academy for Staff Development and J. Sargeant Reynolds Community College. Powhatan also employs a number of individuals associated with the Catholic Diocese of Richmond.

(Data for the other communities was not disclosed for this sector, meaning there is only one employer in this sector).

4.1.6 Retail Trade (NAICS 44-45)

Despite making up 7.5% of total employment (604 employees), the LQ in this sector in Powhatan is only 0.67 which is comparable to Fluvanna and Nelson, below that of Isle of Wight (0.83) and Orange (1.11) but higher than in Goochland (0.35). Employment is spread across 47 business entities in Powhatan, which is comparable to the number in both Nelson (43) and Goochland (51), slightly above Fluvanna (31), and about half the number of establishments in Isle of Wight and Orange County (95 and 96 respectively). Retail enterprises including Wal Mart, Food Lion, Gregg Management Company, R.C. Goodwyn & Sons, and Sheetz are among the County's Top 50 employers.

4.1.7 Other Services (NAICS 81)

The Other Services category includes a variety of activities such as automotive repair and maintenance, equipment and machinery repair, car washes, appliance repair, civic and social organizations, dry cleaning and laundry services, and personal care services such as barber shops and hair and nail salons. Sixty businesses (8.3%) in the Other Services sector operate in Powhatan County. This is more than 25% fewer than the number of like establishments in Goochland, Isle of Wight, and Orange County, yet about twice as many as can be found in Fluvanna and Nelson. Powhatan's leading employer in this sector is the YMCA.

With a LQ of 0.94, employment levels are about average and comparable to Isle of Wight (0.98) and Fluvanna (1.02), lower than in Orange (1.24) and Nelson (1.68) but higher than in Goochland (0.8).

4.1.8 Accommodation and Food Services (NAICS 72)

The Accommodation and Food Services sector is not overly represented in Powhatan. Sector employment is 5.4% (438) and the LQ for Powhatan – below 1 – is consistent with that of the other communities evaluated (except Nelson for which data was not disclosed). Powhatan's employment level is comparable to Fluvanna (6.1%), lower than Isle of Wight (7.5%) and Orange (8.0%), but much lower than Nelson (18.1%); only Goochland (3.3%) was less than Powhatan. There are 25 Food Services businesses located in Powhatan, which is equivalent to the number in Fluvanna, Goochland, and Nelson; however, both Isle of Wight and Orange have nearly twice as much Food Service establishments as the other communities.

4.1.9 Agriculture, Forestry, Fishing and Hunting (NAICS 11)

Surprisingly, the Agriculture, Forestry, Fishing and Hunting industry is, overall, not well represented in Powhatan, particularly considering the rural nature and land mass found in the County. With only eight related businesses and just 28 people employed in this sector, growth opportunities are significant, especially given the community's interest in the sector and desire for rural preservation. Comparatively speaking, Powhatan's LQ for this sector is above average for Virginia at 1.22, likely due to the strength of specific subsectors (i.e. crop production and agriculture and forestry support activities). Nevertheless, when compared to other localities included in this study, Powhatan's location quotient still lags significantly behind all other rural-based economies, especially Fluvanna (4.07), Isle of Wight (6.0), Orange (16.49), and Nelson (21.81). With the exception of Fluvanna, these communities also have at least twice the number of establishments in the sector (ranging 16-31) as Powhatan.

With 250 established farms, Powhatan has fewer than all but Isle of Wight (213). Goochland and Fluvanna have about 50 more, and Nelson and Orange about twice as many farms as Powhatan. Despite the seemingly large number of farms, the market value of all agricultural products sold in Powhatan is only about \$10 million. This amount is about double the value of Fluvanna, yet one third lower than Goochland and Nelson, and a fraction of Isle of Wight's (\$45 million). With a market value of \$90 million, Orange County leads the way in this sector, compared to the other communities.

This data suggests that Powhatan is more of a rural rather than an agricultural community – an important distinction – as can also be said for Goochland and Fluvanna. Conversely, Nelson, Orange, Fauquier (LQ 6.42), Southampton (LQ 13.31), and Charles City (LQ 13.94) are more representative of agricultural communities given the higher location quotients and / or the significantly higher market value of agricultural products produced and sold in these areas. Of notable interest is Fauquier County with the largest number of establishments (77) in the Agriculture sector, the second highest number of farms (1,258), as well as the most employees (408); however, Nelson County shows the largest percentage of total employment in this sector at 8.3%.

Agriculture Overview

	Powhatan County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Nelson County	Orange County
Farms (number)	250	1,258	303	315	213	455	547
Market value of agricultural products sold (\$1,000)	\$10,009	\$53,948	\$4,722	\$16,562	\$45,625	\$15,807	\$90,577

4.1.10 Arts, Entertainment & Recreation (NAICS 71)

Powhatan's recreational industry is composed of 13 entities, four of which – all golf clubs – are among the County's major employers, including Foundry Gold Club and Independence Golf Club. With an employment of 268 (3.3%) and a LQ of 1.64, Powhatan's recreational industry activities are above the Virginia average, and higher than the comparable communities with employment levels of 14-107 and LQs below 1 (0.22-0.92). Goochland is the exception with a LQ of 1.79 and an industry employment of 458 (which is only 3.2% of total county employment). Similarly, the number of establishments for these communities is lower than in Powhatan, ranging between five and nine, with only Goochland having more entities (18) than Powhatan. Given the high LQ and the existing amenities and available land, this is definitely another potential growth sector for the County.

4.1.11 Manufacturing (NAICS 31-33)

Twenty-two (22) small establishments, representing about 3.0% of all companies in the County, comprise Powhatan's manufacturing industry. The number of businesses in this sector is comparable to Goochland (20) and Isle of Wight (24), only slightly lower than in Orange (26) and Nelson (27), and higher than Fluvanna (14). The major difference between Powhatan and the other communities is the employment level, since manufacturing employment in Powhatan is only about 3.2% (260). This compares to 11.6% in Orange, 13.4% in Nelson, and 28.2% in Isle of Wight, making manufacturing a much more prominent sector in these communities with employers such as American Woodmark and Zamma Corporation in Orange, and Gwaltney of Smithfield and International Paper in Isle of Wight. Nelson County is unique in that the majority of its manufacturing industry consists of companies in the food and beverage production subsectors. Specifically, seven of Nelson's Top 50 Employers, including Veritas Vineyard and Winery and Blue Mountain Brewery, operate in these two subsectors. Manufacturing employment in Fluvanna and Goochland, however, is even lower than in Powhatan at just 2% of total employment.

Although Powhatan's larger employers in this sector include Moslow Wood Products and Weightpack Inc., overall, manufacturing employment in the County is below the Virginia average with a LQ of 0.45; By implementing programs such as Technology Zones and modifying the County's tax structure, Powhatan can still attract new industries in this sector – particularly food and beverage manufacturers that could complement potential growth in the County's agribusiness sector.

Location Quotient

Industry	NAICS Code	Powhatan County	Fluvanna County	Goochland County	Isle of Wight County	Nelson County	Orange County
Total, All Industries	00	1.00	1.00	1.00	1.00	1.00	1.00
Accommodation and Food Services	72	0.67	0.84	0.38	0.88	n.d.	0.93
Admin./Support, Waste Mgmt.	56	0.48	2.28	0.62	0.69	0.38	0.60
Agric., Forestry, Fishing and Hunting	11	1.22	4.07	1.81	6.00	21.81	16.49
Arts, Entertainment, and Recreation	71	1.64	0.60	1.79	0.43	0.22	0.92
Construction	23	2.95	1.54	1.63	0.68	1.24	0.92
Educational Services	61	1.09	n.d.	0.58	n.d.	n.d.	1.51
Finance and Insurance	52	n.d.	0.36	n.d.	0.58	0.37	0.74
Health Care and Social Assistance	62	0.32	0.61	0.42	0.65	0.75	0.81
Information	51	0.15	0.15	n.d.	0.14	0.40	0.18
Mgmt. of Companies and Enterprises	55	n.d.	n/a	6.03	0.87	0.09	n.d.
Manufacturing	31-33	0.45	0.34	0.32	4.58	1.78	1.64
Mining, Quarrying, Oil and Gas Extraction	21	n.d.	n.d.	2.34	0.00	n.d.	n.d.
Other Services (exc. Public Admin.)	81	0.94	1.02	0.80	0.98	1.68	1.24
Prof., Scientific, & Techn. Services	54	0.39	0.17	0.34	0.33	0.36	0.26
Public Administration	92	3.10	1.95	0.72	0.78	0.58	0.81
Real Estate and Rental and Leasing	53	0.31	0.24	0.79	0.54	0.84	2.23
Retail Trade	44-45	0.67	0.68	0.35	0.83	0.62	1.11
Transportation and Warehousing	48-49	0.40	0.83	0.30	1.06	0.63	0.74
Unclassified establishments	99	n/a	n/a	n/a	n/a	n/a	n/a
Utilities	22	n.d.	5.28	n/a	n.d.	n.d.	n.d.
Wholesale Trade	42	1.10	0.84	1.35	n.d.	0.13	1.99

Source: LQ calculated using Virginia Employment Commission, QCEW 2013 annual employment data

n.d. - employment data not disclosed; LQ can therefore not be calculated, n/a - Not applicable, the data does not exist

4.2 MAJOR EMPLOYERS

Powhatan's 50 largest employers (by employment size), as reported by the Virginia Employment Commission, reflect the County's overall distribution of industry sectors with 11 Construction companies, eight Accommodation and Food Services entities, six Public Administration entities, and five retailers. Most of the other industries are represented with one, two, or three entities within the ranks of the Top County Employers.



Source: Virginia Employment Commission, 2nd Quarter 2014, Quarterly Census of Employment and Wages (QCEW)

* Anthem is erroneously included in Powhatan's list of top employers. Company does not operate in the County and needs to be removed. Revised VEC data not available yet.

Powhatan County Top Employers

Rank	Employer	NAICS Code	Industry	Ownership	Employment / # of Companies in Sector
NAICS 23 Construction					11
50	Wilton Construction Services	236	Construction of Buildings	Private	20 to 49
9	Colony Construction	237	Heavy and Civil Engineering Construction	Private	100 to 249
27	O C S of VA Inc.			Private	20 to 49
36	R R Dawson Bridge Co			Private	20 to 49
14	Layman & Son Enterprises LLC	238	Specialty Trade Contractors	Private	50 to 99
18	Mid Atlantic Steel Erecto Inc.			Private	50 to 99
25	M.P. Barden & Sons, Inc.			Private	20 to 49
26	Collier Companies			Private	20 to 49
38	2150 Management Co.			Private	20 to 49
41	Trinity Steel Erection Inc.			Private	20 to 49
44	Tdu Concrete Inc.			Private	20 to 49
NAICS 31-33 Manufacturing					2
12	Moslow Wood Products	321	Wood Product Mfr.	Private	50 to 99
30	Weightpack Incorporated	333	Machinery Mfr.	Private	20 to 49
NAICS 42 Wholesale trade					1
11	Anderson Merchandisers, LLC	424	Merchant Wholes., Nondurable Goods	Private	50 to 99
NAICS 44-45 Retail trade					5
40	R.C. Goodwyn and Sons, Inc.	444	Building Material & Garden Equipment & Supplies Dealers	Private	20 to 49
10	Food Lion	445	Food & Beverage Stores	Private	100 to 249
21	Gregg Management Company	446	Health & Personal Care Stores	Private	20 to 49
49	Sheetz	447	Gasoline Stations	Private	20 to 49
7	Wal Mart	452	Gen. Merch. Stores	Private	100 to 249
NAICS 48-49 Transportation and warehousing					3
32	R.S. Thomas Hauling	484	Truck Transportation	Private	20 to 49
46	Fridley Brothers Inc.			Private	20 to 49
31	Postal Service	491	Postal Service	Federal Govt.	20 to 49
NAICS 52 Finance and Insurance*					1
1	Anthem*	524	Insurance Carriers and Related Activities	Private	1000 +

* Anthem is erroneously included in Powhatan's list of top employers. Company does not operate in the County and needs to be removed. Revised VEC data not available yet.

Rank	Employer	NAICS Code	Industry	Ownership	Employment / # of Companies in Sector
NAICS 54 Professional and technical services					3
20	Pietech Inc.	541	Professional, Scientific, and Technical Services	Private	50 to 99
23	Computer Upgrade Kings			Private	20 to 49
48	Sanair Technologies Laboratory			Private	20 to 49
NAICS 61 Educational services					2
2	Powhatan County School Board	611	Educational Services	Local Govt.	500 to 999
13	Catholic Diocese of Richmond			Private	50 to 99
NAICS 62 Health care and social assistance					3
28	Family Practice Specialists of Richmond Inc.	621	Ambulatory Health Care Services	Private	20 to 49
34	Donald R Murry Jr DDS PC			Private	20 to 49
47	Kidzalat LLC	624	Social Assistance	Private	20 to 49
NAICS 71 Arts, entertainment, and recreation					4
15	Kemper Sports Management Inc.	713	Amusement, Gambling, and Recreation Industries	Private	50 to 99
19	Independence Golf Club			Private	50 to 99
29	Foundry at Fine Creek (Laurie Daul)			Private	20 to 49
42	Westham Golf Management			Private	20 to 49
NAICS 72 Accommodation and food services					8
22	McDonald's	722	Food Services and Drinking Places	Private	20 to 49
24	KFC/Taco Bell			Private	20 to 49
33	County Seat Restaurant			Private	20 to 49
35	Mediterraneo Ristorante LLC			Private	20 to 49
37	Starboard Group Employment			Private	20 to 49
39	Degollado LLC			Private	20 to 49
43	Bella Flora, Inc.			Private	20 to 49
45	Wild Ginger			Private	20 to 49
NAICS 81 Other services, except public administration					1
17	YMCA	813	Religious, Civ., Prof., & Similar Org.	Private	50 to 99
NAICS 92 Public Administration					6
6	County of Powhatan	921	Exec., Legisl., Other Gen. Govt. Support	Local Govt.	100 to 249
16	County of Henrico			Local Govt.	50 to 99
3	Virginia Department of Juvenile Justice	922	Justice, Public Order, and Safety Activities	State Govt.	250 to 499
4	Powhatan Correctional Center			State Govt.	250 to 499
5	Deep Meadow Correctional Center			State Govt.	250 to 499
8	Commonwealth of Virginia, Powhatan Reception Class			State Govt.	100 to 249

Source: Virginia Employment Commission, 2nd Quarter 2014, Quarterly Census of Employment and Wages (QCEW)

4.3 WAGE LEVELS

For most industries, wage levels in Powhatan are below neighboring Goochland, but higher than in all other comparative communities. Specifically, the average weekly wage for 'All Industries' in Powhatan in the 3rd Quarter 2014 was \$832*, which is 35% below Goochland's average (\$1,286) but 15% higher than in Isle of Wight (\$721), 20% higher than in Fluvanna (\$693), 25% higher than in Orange (\$658), and 50% higher than in Nelson (\$557). The most notable differences are seen in the Professional, Scientific and Technical Services and Manufacturing categories.

*(*Given the erroneous inclusion of Anthem in the Powhatan QCEW database, the average weekly wage was artificially raised to \$832. While VEC has not released an official update yet, County wages without Anthem would likely be lowered to around \$815.)*

In the Professional, Scientific and Technical Services (PSTS) sector, weekly wages in the County averaged \$1,101. In this sector, the disparity to the comparative communities is much smaller as wages in Goochland are only slightly higher (\$1,163), and somewhat lower in Isle of Wight (\$1,071), Fluvanna (\$996), and Orange (\$922). Powhatan's wages for this sector are much higher than in Nelson (\$781). Subsequently, the County has a good story to tell, particularly when also considering the added advantage of no BPOL tax, as wages are comparable to the overall Richmond MSA averages for the PSTS sector.

Labor costs for Manufacturing operations are also more affordable in Powhatan, as weekly wage levels (\$806) are not only lower than in Goochland (\$1,191), but also lower than in Fluvanna (\$858). Powhatan wages for the Manufacturing sector are also significantly lower than the average for the Richmond MSA (\$1,031).

5 OPERATING COSTS

5.1 TAXES

5.1.1 Real Estate Taxes

Powhatan County's nominal real estate tax rate (\$0.90) is not only the highest of the comparative communities, but also the second highest, after Fauquier (\$0.99), of all eleven communities studied for this report. While the rates in Fluvanna and Isle of Wight County are only slightly lower than in Powhatan, the rate in Orange is about 10% lower, Nelson's rate is 20% lower, and neighboring Goochland County's rate is more than 40% lower (\$0.53). Given the lack of incentive programs to offset this higher rate, Powhatan remains at a competitive disadvantage. Additionally, many of the participants in the Focus Groups and Stakeholder Interviews also commented that the level of services provided in Powhatan was not in keeping with the tax rate – particularly when compared to other localities in the Richmond MSA, especially Goochland and even Henrico (\$0.87).

5.1.2 Machinery & Tools Taxes (M&T)

Powhatan County's nominal M&T tax rate (\$3.60) is the highest of all eleven comparative communities. Despite a seemingly aggressive assessment schedule, ranging from 60% in year 1 to 20% in year 5 and thereafter, the County's effective tax rate remains among the top three highest of all the communities studied and, in year 9, its rate becomes and remains the highest. Southampton and Orange County are the two other localities with similarly high effective rates until year 7, when Isle of Wight County's rate becomes higher than Southampton's and, thus, close to Powhatan's.

Powhatan County fares even worse when comparing its rates directly to those of Fluvanna, Goochland, Isle of Wight, and Nelson County. Fluvanna, for example, has an effective rate of \$0.26 from year 1; Goochland starts off with an effective rate of \$0.75 in year 1 that is only slightly higher than Powhatan's **lowest rate** in year 5 (\$0.72). In reviewing and calculating effective rates over the long-term, Powhatan is at a clear competitive disadvantage with its M&T tax rates.

5.1.3 Business Tangible Personal Property Taxes

Powhatan County's nominal Business Tangible Personal Property tax rate (\$3.60) is the median of all communities studied. A closer look at the effective rates shows that the County is more competitive here than it is for either Real Estate or M&T taxes. Although it has the fourth highest rate of all communities studied, and the second highest after Goochland County in year one, Powhatan's aggressive depreciation schedule initially pays off and rates in year two and beyond are lower than in most communities; however, the more progressive depreciation schedules of communities such as Orange, Mecklenburg, Southampton, and Charles City allow their respective rates, overall, to be lower than Powhatan's. Of the five comparison communities, Goochland and Isle of Wight County are the least competitive since their effective rates are higher than Powhatan's almost the entire time. Fluvanna's rate remains the same throughout (\$0.83) and, therefore, is only above Powhatan County starting in year five; however,

Fluvanna does not tax properties that have been in a business for ten or more years. Orange County is also interesting, as its rate is initially lower than Powhatan, but higher in years four through eight and beyond. Nelson has the most competitive rate of the six communities, stable at \$0.52 the entire time.

Several Virginia communities, including some of those studied, (i.e. Mecklenburg, Bedford,...) offer accelerated depreciation schedules for computer equipment, giving them a competitive advantage when pursuing certain industry sectors such as data centers and software development companies.

5.1.4 Business Professional & Occupational License (BPOL)

This is one area where Powhatan has a distinct advantage over its competitors, since the BPOL tax is generally deemed quite onerous and unfair. With no Merchants' Capital Tax either, Powhatan is well positioned to attract additional business services and other operations such as warehousing and distribution. Powhatan shares this advantage with Bedford, Fluvanna, and Nelson County, which also have neither BPOL nor Merchant's Capital; however, all other communities evaluated have one or the other tax in place.

5.1.5 Sales and Use Tax

The local sales and use tax rate in all Virginia communities is 1% although, in localities in Northern Virginia and Hampton Roads, the State portion is 0.7% higher. These higher rates apply in two of the localities studied – Isle of Wight and Southampton County – where additional revenue generated from the higher percentage is dedicated to addressing the area's transportation needs. While not necessarily significant, this is one area where Powhatan could, again, have a competitive advantage over its competitors.

5.1.6 Lodging and Meals Taxes

Powhatan County currently does not impose a meals or lodging tax. While this can offer competitive benefits over other locations, revenue streams coming from these taxes typically outweigh other benefits. Additionally, lodging and meals taxes are some of the only revenue sources that can be shared with non-County residents. Of the ten communities reviewed for this project, the majority are enjoying the additional revenues generated by these taxes while only three other communities – Fluvanna, Goochland, and Charles City – are like Powhatan and currently don't impose either the meals or lodging tax.

5.2 LAND PRICES AND LEASE RATES

At an average of \$9.12/sf, lease rates in Powhatan are on par with Goochland, yet higher than all the comparable communities except Nelson County.

Although Powhatan has over 37% more existing space than Goochland, vacancy rates are much higher (13.1% versus 10.3%).

Median land prices in Powhatan are significantly higher than two of the comparative localities (Orange and Isle of Wight) yet only about 11% higher than in nearby Goochland. This is likely

attributable to the County’s restrictive development policies, proffers policy, and limited utility infrastructure – creating a typical “supply and demand” scenario.

	Powhatan County	Fluvanna County	Goochland County	Isle of Wight County	Nelson County	Orange County
# Existing Buildings	121	54	102	270	30	136
Total Existing Space (SF)	1,167,292	716,490	850,446	6,143,989	378,785	2,391,187
Vacancy Rate	13.1%	39.3%	10.3%	7.9%	0.3%	7.0%
Rent per SF	\$9.12	\$3.62	\$9.11	\$4.79	\$14.00	\$8.32
Land Price per Acre (median)	\$70,000	\$214,286	\$62,860	\$46,483	\$773,844	\$43,515

5.3 UTILITY RATES

The significant variation in utility providers and their associated rate structures makes an “apples to apples” comparison somewhat difficult. Nevertheless, some obvious differences can still be noted that are likely to affect Powhatan’s ability to successfully compete for certain users.

5.3.1 Water and Sewer

As a general rule, each water and sewer system defines connection fees, availability fees, recovery fees, and facility fees differently. Similarly, and in addition to standard utilization rates, some providers impose other expenses such as meter fees, monthly fixed charges, and seasonal availability fees while others do not. Unfortunately, some of the providers considered in this assessment did not offer any clarification of their fees structure nor would they respond to inquiries for that information; thus, the comparative analysis is limited to one provider per community and based on facility and connection fees, as well as basic utilization rates.

Base fees (connection/availability fees) for water in Powhatan are not significantly different than in other areas but the County’s sewer facility fee is more than twice the cost of several comparative communities including Nelson, Isle of Wight, and Orange, and 60% higher than in Goochland. The utilization rates, on the other hand, are much more favorable in Powhatan. Specifically, both sewer and water utilization rates are lower in Powhatan than in four of the five comparison communities. For example, based on 600,000 gallons, the monthly sewer charge to a user in Powhatan is \$2,904, about the same as in Isle of Wight and significantly lower than the rates in Orange (\$4,098), Nelson (\$5,947), and Goochland (\$6,936). Similarly, Powhatan’s water utilization rates (\$2,736 per month for 600,000 gallons) compare favorably to these communities (ranging from \$3,060-\$6,296), except for the rates in certain areas of Orange County (Rt. 20 and the Town of Gordonsville) where the rates (\$1,416 and \$2,298 respectively) are significantly lower than in Powhatan despite a summer conservation charge (not included in the total quoted above).

Source: Utility Providers/Websites

Sewer Rates	Connection / Tap fees	Utilization Rates	Comparison (600,000 gallons)
Powhatan County	Facility Fee sewer 1": \$22,500	\$4.84/1,000 gallons	\$2,904
	Bi-Monthly capacity charge 1": \$68.13		
	Meter fee 1": \$515		
Fluvanna County Public Works	Public water and sewer are available at Lake Monticello and portions of Palmyra. Public water service is available in portions of Fork Union	Data not provided	n/a
Goochland County	Connection fee 1": \$14,308	\$11.56/1,000 gallons	\$6,936
Isle of Wight County	Connection fee 1": \$6,400 plus \$0.33/square foot of gross floor area	< 20,000: \$6.00/1,000 gallons > 20,000: \$4.50/1,000 gallons	\$2,730
Nelson County Water & Sewer Authority	Connection fee: \$10,000	Up to 4,000 gallons: \$47.05 Over 4,000 gallons: \$47.05 + \$9.90/1,000 gallons	\$5,947
	Availability fee: \$5/month		
Rapidan Service Authority: Gordonsville Sewer System	Availability Fee Per EDU: \$10,000	\$6.83/1,000 gallons	\$4,098

Water Rates	Connection / Tap fees	Utilization Rates	Comparison (600,000 gallons)
Powhatan County	Facility Fee water: 1": \$10,250	\$4.56/1,000 gallons	\$2,736
	Bi-Monthly capacity charge 1": \$54.08		
	Meter fee 1" \$515		
Fork Union Sanitary District - Fluvanna	Public water and sewer are available at Lake Monticello and portions of Palmyra. Public water service is available in portions of Fork Union.	Data not provided	n/a
Goochland County	Water connection fee 1": \$7,998 Service charge may be applicable	\$7.71/1,000 gallons	\$4,626
Isle of Wight County	Connection fee 1": \$12,600	< 25,000: \$8.25/1,000 gallons > 25,000 gallons: \$7.25/1,000 gallons	\$4,375
	Meter fee: \$42/month		
Nelson County	Connection fee: \$10,000	Usage fees for sewer usage	\$6,296

Water & Sewer Authority	Basic service fee (up to 4,000 gallons/billing): \$38.20	over 4,000 gallon minimum (per 1,000 gallons): \$10.50	
	Availability fee: \$3.50/month		
Rapidan Service Authority: Orange County, Rte. 15 Water System	Availability Fee Per EDU: \$10,000	\$5.10/1,000 gallons	\$3,060
		Town of Gordonsville Wholesale Rate: \$3.83/1,000 gallons	\$2,298
		Summer Conservation Surcharge: For usage over 6,000 gallons (July-October): Additional \$1.00/1000 Gallons	\$594/month (for 4 months)
Rapidan Service Authority: Orange County, Rte. 20 Water System	Availability Fee Per EDU: \$10,000	\$2.36/1,000 gallons	\$1,416
		Summer Conservation Surcharge: For usage over 6000 gallons (July-October): Additional \$1.00/1000 Gallons	\$594/month (for 4 months)

Source: Utility Providers/Websites

5.3.2 Electric

Powhatan is served by two power providers, Dominion Virginia Power (Dominion) and Southside Electric Cooperative (SEC). All other communities studied, except for Bedford and Nelson County, are also served by Dominion. Additional providers for the latter two communities are Appalachian Power (AEP) for both, and the Town of Bedford and Southside Electric Coop (SEC) for Bedford County. The other communities studied are also served by at least one additional provider including Central Virginia Coop and Community Electric Coop and others. Due to the complexity of the rate structures and limited availability of data, a rate comparison is provided for the four providers listed below.

Given Dominion’s competitive cost/KwH for both industrial (\$0.0568) and commercial (\$0.0808) customers, Powhatan County shares a competitive advantage with the other Dominion served communities. The slightly higher rates (\$0.0813 or \$0.0985) provided by SEC, however, can lead to a disadvantage for Powhatan when competing with sites in other communities that are served by Dominion or other providers [i.e. Appalachian Power (\$0.0667) or (\$0.0928)].

Cost per KwH for an Industrial Customer with a demand of 1,000 kW and using 650,000 kWh/month (90% load factor)

Industrial Customer	Cost/KwH	Monthly Total	Communities
Dominion Virginia Power	\$0.0568	\$36,920	Powhatan, Fauquier, Fluvanna, Goochland, Isle of Wight, Mecklenburg, Orange, Southampton, Charles City

Appalachian Power	\$0.0667	\$43,355	Bedford, Nelson
Town of Bedford	\$0.0633	\$41,115	Bedford
Southside Electric Coop	\$0.0813	\$52,869	Powhatan, Bedford

Source: Edison Electric Institute's "Typical Bills and Average Rates Report - Winter 2015" (DVP & AEP);

Otherwise, SEC & Town of Bedford

Calculation: average cost per kWh X the number of kWh

Cost per kWh for a Commercial Customer with a demand of 500 kW and using 180,000 kWh/month (50% load factor)

Commercial Customer	Cost/kWh	Monthly Total	Communities
Dominion Virginia Power	\$0.0808	\$14,544	Powhatan, Fauquier, Fluvanna, Goochland, Isle of Wight, Mecklenburg, Orange, Southampton, Charles City
Appalachian Power	\$0.0928	\$16,704	Bedford, Nelson
Town of Bedford	\$0.0924	\$16,632	Bedford
Southside Electric Coop	\$0.0985	\$17,727	Powhatan, Bedford

Source: Edison Electric Institute's "Typical Bills and Average Rates Report - Winter 2015" (DVP & AEP);

Otherwise, SEC & Town of Bedford

Calculation: average cost per kWh X the number of kWh

5.3.3 Natural Gas

Natural gas is not available in Powhatan County and will, therefore, limit the types of manufacturing operations that the County may consider.

6 LOCAL REVENUES

6.1 TOTAL REVENUE

Of the total revenues generated in Powhatan County in FY'14 (\$74,272,567), approximately 58% were generated locally, 38% from the Commonwealth of Virginia, and the remaining 4% stem from federal pass-through funds. Powhatan generated more revenues locally than Fluvanna, Isle of Wight, and Orange County (54-57%), but less than Goochland (70%) and Nelson County (65%). (See Appendix B, Section 7: Revenues for additional details).

6.2 GENERAL PROPERTY TAX REVENUE

General Property taxes (\$34,940,715) make up about 81% of the County's revenue. This is comparable to Fluvanna but 4-10 percentage points higher than in the other communities.

Local Revenues FY'14

	Powhatan	Fluvanna	Goochland	Isle of Wight	Nelson	Orange
General Property Taxes Total	\$34,940,715	\$28,588,876	\$31,119,082	\$43,628,917	\$21,894,598	\$37,472,646
<i>Per Capita</i>	\$1,228	\$1,099	\$1,454	\$1,197	\$1,457	\$1,098
<i>% of Revenue</i>	80.82	80.98	75.47	74.01	73.78	76.21
Real Property	\$27,316,862	\$19,154,159	\$21,257,950	\$29,571,776	\$17,679,424	\$27,802,213
Public Service Corporations	\$803,610	\$4,259,048	\$635,563	\$1,069,920	\$646,946	\$1,175,665
Personal Property: General	\$5,883,910	\$4,825,586	\$8,366,842	\$8,747,520	\$3,153,367	\$7,300,940
Personal Property: Mobile Home	\$6,573	\$14,788	\$4,515	\$132,753	\$29,069	\$30,842
Machinery & Tools	\$356,379	\$14,195	\$348,029	\$3,603,109	\$10,891	\$554,740
Merchant's Capital	\$0	\$0	\$0	\$0	\$0	\$153,031
Penalties	\$323,736	\$239,357	\$291,410	\$334,094	\$196,788	\$303,406
Interest	\$249,645	\$81,743	\$214,773	\$169,745	\$178,113	\$151,809
Other Local Taxes Total	\$4,250,661	\$2,957,767	\$6,479,035	\$5,374,407	\$4,022,028	\$5,074,457
<i>Per Capita</i>	\$149	\$114	\$303	\$147	\$268	\$149
<i>% of Revenue</i>	9.83	8.38	15.71	9.12	13.55	10.32
<i>% of Average</i>	48.16	36.65	97.60	47.52	86.26	47.91
Local Sales and Use Taxes	\$1,953,664	\$1,403,062	\$2,495,443	\$2,049,667	\$1,059,452	\$2,249,569
Consumer Utility Taxes	\$699,279	\$541,027	\$390,637	\$885,039	\$469,621	\$663,348
Business License Taxes	\$102,179	\$0	\$668,023	\$443,454	\$31,140	\$0
Franchise License Taxes	\$167,166	\$0	\$0	\$8,047	\$103,074	\$24,219
Motor Vehicle License Taxes	\$985,351	\$715,553	\$796,099	\$918,844	\$692,264	\$960,387
Bank Stock Taxes	\$0	\$52,939	\$1,603,482	\$8,836	\$76,659	\$61,718
Recordation and Will Taxes	\$337,493	\$245,186	\$426,458	\$128,804	\$292,634	\$373,263
Hotel and Motel Room Taxes	\$0	\$0	\$1,085	\$21,936	\$417,453	\$28,828
Restaurant Food Taxes	\$0	\$0	\$0	\$330,925	\$879,731	\$713,125
Other Local Taxes	\$5,529	\$0	\$97,808	\$578,855	\$0	\$0

Source: Auditor of Public Account, Commonwealth of Virginia

6.2.1 Real Estate Tax Revenue

As with most localities, real estate taxes comprise the largest portion of general property taxes (78%), which is similar to Nelson (81%) and Orange (74%) but higher than in Fluvanna, Goochland and Isle of Wight (about 68% each). The most notable difference can be seen in Public Service Corporations, General Personal Property, and Machinery & Tools.

A closer look at the revenues generated from residential, commercial/industrial, and agricultural properties in Powhatan and two comparison communities (Goochland and Nelson) shows that a notably large percentage (85%) of all real estate revenues in the County are generated by residential properties. While not that uncommon, revenues in these comparison communities appear to be significantly less reliant on residential real estate than is Powhatan – something that is certainly cause for concern. Given the large percentage of residential properties in Powhatan, commercial/industrial properties and agricultural properties make up only 7% and 8% of real estate respectively. In Goochland, commercial properties comprise a much greater share of real estate (19%) as do agricultural properties (11%). In Nelson, the overall value of commercial/industrial properties (3.9%) is even less than in Powhatan but the community's agricultural class accounts for almost 30% of total land values.

Additionally, Powhatan's land use exemption (\$320 million in land) reduces its total taxable agricultural properties by more than 55%. Given the overall low share of commercial/industrial and agricultural properties, the land use exemption should be reviewed.

Real Estate Values and Taxes by Class

Real Estate Values	Powhatan County FY'14		Goochland County FY'14 (2013 Land Book)		Nelson County FY'14		Orange County FY'14		Isle of Wight County FY'14	
	Real Estate Values	%	Real Estate Values	%	Real Estate Values	%	Real Estate Values	%	Real Estate Values	%
Total Taxable Value	\$3,040,216,425	100%	\$4,054,090,042	100.0%	\$3,177,903,000	100%	\$3,679,856,200	100%	\$4,147,194,000	100%
Residential	\$2,583,852,700	85.0%	\$2,823,196,691	69.6%	\$1,907,839,400	60.0%	\$2,851,679,600	77.5%	3,239,296,300	78.1%
Commercial/Industrial	\$205,956,200	6.8%	\$768,529,076	19.0%	\$124,080,900	3.9%	\$285,469,200	7.8%	665,825,700	16.1%
Agricultural Final	\$250,407,525	8.2%	\$462,364,275	11.4%	\$939,249,800	29.6%	\$542,707,400	14.7%	\$242,072,000*	5.8%
Agricultural w/Land Use	\$571,239,000						\$935,478,300		*Does not reflect land use assessment	
Land Use	(\$320,831,475)	56.2% of total agric.					-\$392,770,900			
Exempt					\$206,732,900	6.5%				
Real Estate Taxes	FY'14		FY'14		FY'14					
Total RE Taxes	\$27,361,948		\$22,196,154		\$17,474,814					
Less PSC etc.	\$803,610		<i>Data not provided by County</i>		\$646,946					
RE from Classes	\$26,558,338		\$21,486,677		\$16,827,868					
RE from Residential	\$22,571,693		\$14,962,942		\$10,102,533					
RE taxes from Comm/Ind	\$1,799,166		\$4,073,204		\$657,042					
RE taxes from Agriculture	\$2,187,478		\$2,450,531		\$4,973,585					

Source: Powhatan County, Goochland County, Nelson County Finance Departments; Orange and Isle of Wight County FY'14 CAFR

6.2.2 Machinery & Tools Tax Revenue

The Machinery & Tools tax revenue in Powhatan comprises only \$356,379 or 1% of the general property taxes. This is about equal to Goochland and Orange County's revenue proportions (1-1.5%), lower than Isle of Wight (8.3%) where manufacturing operations are more prominent, and much higher than in Nelson and Fluvanna (0.05%).

6.3 OTHER LOCAL TAXES REVENUE

Other Local Taxes in Powhatan make up about 10% of total revenue or \$149 per capita, which is equal to Orange and Isle of Wight, and slightly higher than Fluvanna, but considerably lower than in Goochland (16% or \$303 per capita) and Nelson (14% or \$268 per capita). Goochland's additional revenues mainly stem from Bank Stock taxes from Capital One. In Nelson County, Lodging and Meals Taxes (32.3%) generate \$1.3 million of Other Local Taxes (see Table Local Revenues FY'14 on page 31). Other communities that impose these two taxes, also increase their revenues by amounts varying from \$350,000 in Isle of Wight (7% of Other Local Taxes) to \$740,000 (15%) in Orange, \$170,000 (8%) in Southampton or \$1.8 million (20%) in Bedford County (please refer to Appendix B, Section 7.2. Local Revenues for detailed information).

Appendix B

Primary Data Points &
Detailed Benchmarking Research

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Primary Data Points & Detailed Benchmarking Research:

1 TRANSPORTATION

1.1 ROAD INFRASTRUCTURE

Name	Distance
I-64	5.4 miles (8.7 km)
I-295	6.7 miles (10.8 km)
I-195	9.0 miles (14.4 km)
I-95	10.2 miles (16.4 km)
I-85	24.0 miles (38.7 km)

Note: Measured from border of locality/region.

Source: VEDP

1.2 MAJOR HIGHWAYS

State Highway 13	Known as Old Buckingham Road, SR 13 runs US Route 60 and SR 45 in Cumberland County east to US 60 in Plain View. SR 13 parallels US 60 to the south through eastern Cumberland County and western Powhatan County and passes through the latter county's seat of Powhatan.
U.S. Highway 60	Running west to east through the County, connecting it to Cumberland County in the West and Chesterfield County in the East. It intersects Rt. 288 after crossing into Chesterfield County.
State Highway 288	SR 288 runs from I-95 (north of Chester) through Chesterfield, Powhatan and Goochland Counties to I-64 near Short Pump, the western side of Richmond. The County has one Exit, SR 711, (Huguenot Trail / Robious Road).
State Highway 300	SR 300 is a 0.64-mile (1.03 km) state highway in Powhatan, running from SR 13 next to the Powhatan County courthouse to US 60.
Highway 522	US 522 is a minor highway in Central Virginia, running North-South, connecting several county seats, including Powhatan, Goochland, and Culpeper.

1.3 COMMERCIAL AIR SERVICE

Name	City	Distance
Richmond International Airport	Sandston	41.1 miles (66.1 km)
Charlottesville-Albemarle Airport	Charlottesville	66.2 miles (106.5 km)

Note: Within 75 miles of nearest locality boundary.

Source: VEDP

1.4 GENERAL AVIATION SERVICE

Name	Runway Length
Chesterfield County Airport	5,500 ft (1,676 m)

1.5 FREIGHT RAIL SERVICE

Norfolk Southern Railway Company

1.6 SEAPORTS

Name	Distance
Port of Richmond	32.0 miles (51.5 km)
Port of Virginia	132.0 miles (212.4 km)

Note: Driving distance from center of Powhatan County to Ports.

Source: VEDP

2 LIVING

2.1 HEALTHCARE AND HOSPITALS

Johnston-Willis Hospital is about a 20-minute (10 mile) drive east of the County on U.S. Route 60 in Chesterfield County.

St. Francis Medical is about a 15-minute (10 mile) drive Southeast of the County via Rt. 288 in Chesterfield County.

Eighteen additional hospitals are located in the region, including the highly-respected Virginia Commonwealth University Medical Center.

The Powhatan County health department provides public health services in the County.

Additionally, several private emergency and urgent care treatment centers are located in the region.

Approximately 1,800 physicians and 500 dentists are available in the Richmond region. According to the Virginia Boards of Medicine and Dentistry, six licensed physicians and 13 licensed dentists practice in Powhatan County.

2.2 COST OF LIVING COMPARISON (ACCRA)

Metro/Micro Area	Compo-site Index	Grocery Items	Housing	Utilities	Transportation	Health Care	Misc. Goods & Services	Apartment Rent	Home Price
Richmond Metro	94.6	95.9	84.6	110.6	88.1	100.9	99.4	\$878	\$255,833
Charlottesville Metro	102.9	97.7	107.5	97.6	97.8	105.2	104.4	\$1,029	\$331,042
Danville City VA	99.5	101.7	86.7	109.9	88.4	92.6	111.7	\$623	\$277,804
Harrisonburg Metro	98.4	92.6	101.3	104.8	89.2	103.9	99.2	\$923	\$315,463
Lynchburg Metro	90.0	91.6	81.6	97.8	86.9	95.3	94.7	\$801	\$251,282
Martinsville-Henry Co.	85.8	95.5	69.0	80.1	90.1	87.6	96.2	\$627	\$217,267
Roanoke Metro	90.6	90.3	89.0	99.7	87.9	96.1	89.5	\$762	\$285,067
Staunton-Waynesboro Metro	93.7	90.5	91.5	105.0	90.7	93.6	94.7	\$844	\$283,527
VA Bch-Norfolk-NNews Metro	97.4	91.1	93.7	84.7	104.0	108.8	103.6	\$925	\$267,445
Winchester - WV Metro	100.3	100.4	97.1	93.5	94.1	98.8	107.8	\$886	\$300,512
Northern VA/DC Metro	143.3	111.8	244.6	97.6	121.4	94.3	97.9	\$2,033	\$792,009
Lexington-Buena Vista-Rkbrg	95.7	90.4	92.3	106.8	99.3	92.1	96.5	\$795	\$296,485

100=U.S. Average

Source: ACCRA - Q1 2015

2.3 HOUSING

	Powhatan County	Fluvanna County	Goochland County	Isle of Wight County	Nelson County	Orange County
Median List Price	\$339,000	n/a	\$475,000	\$319,000	n/a	\$262,000
Median List \$/Sq Ft	\$136		\$164	\$133		\$138
Median Sale Price	\$261,000		\$400,000	\$265,000		\$210,000
Median Sale \$/Sq Ft	\$125		\$148	\$125		\$126
Median Sale / List	97.8%		99.8%	98.1%		97.0%
Number of Homes Sold	126		79	115		152

Calculated using the last 90 days, n/a: no data provided for community

Source: Redfin, 90-Day Overview (as of 8/24/2015)

2.4 EDUCATION

2.4.1 Public Schools

Powhatan County	Enrollment (Fall 2014)
Elementary	
Flat Rock Elementary School	591
Pocahontas Elementary School	467
Powhatan Elementary School	420
Middle Schools	
Pocanhontas Middle School	651
Powhatan Jr. High School	688
High Schools	
Powhatan High School	1,400
Total Enrollment	4,217

Source: VA Dept. of Education

	Powhatan County	Fluvanna County	Goochland County	Isle of Wight County	Nelson County	Orange County
Total Enrollment (Fall 2014)	4,217	3,627	2,438	5,579	1,933	5,222
Elementary Schools	3	3	3	5	2	6
Enrollment	1,478	1,379	1,068	2,851	875	2,529
Middle Schools	2	1	1	2	1	2
Enrollment	1,339	853	597	971	449	1,194
High Schools	1	1	1	2	1	1
Enrollment	1,400	1,395	773	1,757	609	1,499
On-Time Graduation Rate (Class of 2014)	87.9%	91.2%	96.2%	92.6%	87.3%	90.7%
Student Teacher Ratio (FY2014)						
K-7	14:01	14:01	12:01	15:01	12:01	14:01
8-12	13:01	14:01	13:01	13:01	12:01	15:01
Per Pupil Expenditure (FY 2014)	\$10,143	\$9,218	\$11,089	\$9,667	\$12,489	\$9,314

Source: VA Dept. of Education

2.4.2 Higher Education

Higher Education Facilities	
Facility	Fall 2014 Enrollment
Virginia Commonwealth University	31,163
J. Sargeant Reynolds Community College	11,861
John Tyler Community College	9,875
University of Richmond	4,182
Virginia Union University	1,717
Randolph-Macon College	1,394
Centura College*	388
Union Presbyterian Seminary*	205
Old Dominion University - Richmond Campus	†
Virginia Tech - Richmond Center	†
Baptist Theological Seminary at Richmond	†
Bon Secours Memorial College of Nursing	†
Bryant & Stratton College - Richmond Campus	†
Central Michigan University - Richmond Center	†
ECPI University	†
Fortis College - Richmond Campus	†
ITT Technical Institute - Richmond Campus	†
South University - Richmond Campus	†
Stratford University	†
Strayer University - Henrico Campus	†
Virginia College	†

† Enrollment figures are not available. // * Fall 2013 enrollment

2.5 LIBRARY

The Powhatan County Public Library is centrally located in the county in the village of Powhatan. Reciprocal arrangements with other area localities allow residents to obtain virtually any title desired.

2.6 PUBLIC SAFETY

2.6.1 Department of Emergency Management System

The Department of Emergency Management coordinates Powhatan County's planning for and the coordinated response to significant natural, manmade, and terrorist incidents that exceed the normal day-to-day response capabilities of Powhatan County's emergency response system. This system includes the departments of Fire, Sheriff, and the Powhatan Rescue Squad. During significant incidents this response system expands to include many other public and private agencies and volunteer groups to meet the needs of the citizens.

The Powhatan Alert System (PAS) provides critical information to Powhatan County residencies and businesses during emergencies. PAS enables Powhatan County officials to provide you with critical information and directions quickly in a variety of situations such as missing persons, chemical spills, evacuations, a search for wanted persons, and during other emergencies. You will receive these time-sensitive messages wherever you specify, such as your home, mobile or business phones, email address, text messages or TTY.

2.6.2 Fire Department & EMS

Powhatan County Fire Department is made up of five volunteer fire companies (numbering about 270 volunteers), Powhatan volunteer rescue squad (about 50 members), and the Powhatan County Fire Administration Office, which consists of a fire chief, an office manager and four part-time employees. The fire department responds to emergency and non-emergency calls.

Emergency Medical Services in Powhatan County are provided by the Powhatan Volunteer Rescue Squad (PVRS) (<http://powhatanrescue.com/about.html>), supplemented by contract EMS providers paid by the County. These organizations provide 24 hour basic and advanced life support seven days a week, 365 days a year.

Locations

[Company 1](#)

Powhatan Volunteer
Fire Department
3971 Old Buckingham Road
Powhatan, VA. 23139

[Company 4](#)

Fine Creek Volunteer
Fire Department
1825 Huguenot Trail
Powhatan, VA. 23139

[Company 2](#)

Huguenot Volunteer
Fire Department
1922 Urbine Road
Powhatan, VA. 23139

[Company 5](#)

Deep Creek Volunteer
Fire Department
5631 Anderson Highway
Powhatan, VA. 23139

Company 3
Macon District Volunteer
Fire Department
6377 Old Buckingham Road
Powhatan, VA. 23139

Fire Administration:
3910 Old Buckingham Road
Powhatan, VA 23139

2.6.3 Sheriff's Office

The Sheriff's Office is located downstairs in the Powhatan County Courthouse Building.

Address:

3880 Old Buckingham Road
Post Office Box 133
Powhatan, VA 23139

The Powhatan Sheriff's Office has 42 full-time and five part-time sworn law enforcement positions (including vacancies).

3 POPULATION

3.1 POPULATION OVER TIME

	Powhatan County	Bedford County*	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Population 2013 (ACS 5 year estimate)	28,259	75,773	67,207	25,977	21,626	35,656	31,426	14,789	34,689	18,128	7,130
2014 (July 1, Estim.) Weldon Cooper	28,706	77,213	67,512	25,970	21,703	36,172	32,052	15,074	34,487	18,783	7,249
2010 (April 1, estimates base)	28,046	74,898	65,203	25,691	21,717	35,270	32,727	15,020	33,481	18,570	7,256
2000	22,377	60,371	55,139	20,047	16,863	29,728	32,380	14,445	25,881	17,482	6,926
1990	15,328	45,553	48,700	12,429	14,163	25,053	29,241	12,778	21,421	17,022	6,282
1980	13,062	34,927	35,889	10,244	11,761	21,603	29,444	12,204	18,063	18,316	6,692
April 1, 2010-July 1, 2014 % change	2.4%	3.1%	3.5%	1.1%	-0.1%	2.6%	-2.1%	0.4%	3.0%	1.1%	-0.1%
2000-July 1, 2014 % Change	28.3%	n/a	22.4%	29.5%	28.7%	21.7%	-1.0%	4.4%	33.3%	7.4%	4.7%
2000-2010 % change	25.3%	13.8%	18.3%	28.2%	28.8%	18.6%	1.1%	4.0%	29.4%	6.2%	4.8%
1990-2010 % change	83.0%	50.8%	33.9%	106.7%	53.3%	40.8%	11.9%	17.5%	56.3%	9.1%	15.5%
1980-2010 % change	114.7%	96.6%	81.7%	150.8%	84.6%	63.3%	11.1%	23.1%	85.4%	1.4%	8.4%
Projections											
2020	32,019	77,257	74,118	29,009	24,088	38,828	32,877	15,091	37,648	18,684	7,811
2030	35,702	86,325	83,312	31,839	25,886	41,946	32,968	15,044	41,207	18,568	8,376
2040	39,343	95,943	93,028	34,537	27,505	44,922	33,037	14,976	44,662	18,412	8,905
Land Area / Density											
Land Area (in sq. miles)	260.2	753	647.4	286	281.4	315.6	625.5	470.9	340.8	599.1	182.8
Population Density ('13)	108.6	92.7	103.8	90.8	76.9	113	50.2	31.4	101.8	30.3	39

Source: U.S. Census Bureau, American Community Survey, 5 Year Estimates (2009-2013), Weldon Cooper Center for Public Service (Estimates, Projections), Statsamerica.org

*Bedford County data 2010 and newer includes Town of Bedford; prior statistics do not.

3.2 COMPONENTS OF POPULATION CHANGE

	Powhatan County	Bedford County*	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Net Domestic Migration (change 2012/2013)	61	346	397	-123	278	249	-295	28	344	-163	-18
Net International Migration (change 2012/2013)	-1	27	35	15	0	23	60	3	42	4	0
Natural Increase (births minus deaths)	46	-65	225	102	-6	-26	-144	-22	97	-51	-29
Births	235	586	748	271	150	312	294	126	401	131	52
Deaths	189	651	523	169	156	338	438	148	304	182	81

Source: US Census Bureau, Statsamerica.org

*Does not include Town of Bedford

3.3 POPULATION ESTIMATES BY AGE (2013)

	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Total Population	28,259	75,773	67,207	25,977	21,626	35,656	31,426	14,789	34,689	18,128	7,130
Preschool (0 to 4)	1,134	3,394	3,831	1,393	864	1,708	1,514	673	2,032	806	236
School Age (5 to 17)	4,442	12,361	12,415	4,246	3,291	5,806	4,570	2,108	5,666	2,727	935
College Age (18 to 24)	2,343	5,745	5,302	1,835	1,380	2,780	2,276	960	2,494	1,414	511
Young Adult (25 to 44)	6,844	15,967	15,183	6,539	4,583	7,771	6,414	2,880	8,064	3,942	1,487
Older Adult (45 to 64)	9,273	24,038	20,792	7,399	7,489	11,644	9,400	4,818	9,704	6,100	2,533
Older (65 plus)	4,223	14,268	9,684	4,565	4,019	5,947	7,252	3,350	6,729	3,139	1,428
Preschool (< 5 years)	4.0%	4.5%	5.7%	5.4%	4.0%	4.8%	4.8%	4.6%	5.9%	4.4%	3.3%
Preschool/School Age (< 18 years)	19.7%	20.8%	24.2%	21.7%	19.2%	21.1%	19.4%	18.8%	22.2%	19.5%	16.4%
College Age/Adult (18-64 years)	65.3%	60.4%	61.4%	60.7%	62.2%	62.2%	57.6%	58.5%	58.4%	63.2%	63.5%
<i>College Age (18 to 24)</i>	<i>8.3%</i>	<i>7.6%</i>	<i>7.9%</i>	<i>7.1%</i>	<i>6.4%</i>	<i>7.8%</i>	<i>7.2%</i>	<i>6.5%</i>	<i>7.2%</i>	<i>7.8%</i>	<i>7.2%</i>
<i>Young Adult (25 to 44)</i>	<i>24.2%</i>	<i>21.1%</i>	<i>22.6%</i>	<i>25.2%</i>	<i>21.2%</i>	<i>21.8%</i>	<i>20.4%</i>	<i>19.5%</i>	<i>23.2%</i>	<i>21.7%</i>	<i>20.9%</i>
<i>Older Adult (45 to 64)</i>	<i>32.8%</i>	<i>31.7%</i>	<i>30.9%</i>	<i>28.5%</i>	<i>34.6%</i>	<i>32.7%</i>	<i>29.9%</i>	<i>32.6%</i>	<i>28.0%</i>	<i>33.6%</i>	<i>35.5%</i>
Older (65+)	14.9%	18.8%	14.40%	17.60%	18.60%	16.70%	23.10%	22.70%	19.40%	17.30%	20.0%
Median Age	42.6	44.5	41.5	41.5	45.8	44.2	46.4	47.9	42.7	44.8	47.4
Male %	53.8%	49.6%	49.4%	45.7%	49.6%	48.7%	48.2%	49.0%	49.1%	51.7%	48.9%
Female %	46.2%	50.4%	50.6%	54.3%	50.4%	51.3%	51.8%	51.0%	50.9%	48.3%	51.1%

Source: US Census Bureau, American Community Survey, 5 Year Estimates (2009-2013)

3.4 POPULATION ESTIMATES BY RACE (2013)

	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
White alone (a)	84.9%	91.3%	87.4%	81.5%	79.1%	72.4%	61.9%	84.4%	82.9%	61.3%	42.2%
Black or African American alone (a)	12.9%	5.9%	8.2%	15.5%	17.9%	24.2%	35.2%	12.6%	13.0%	36.6%	47.3%
American Indian and Alaska Native alone (a)	0.3%	0.3%	0.5%	0.3%	0.3%	0.5%	0.3%	0.4%	0.4%	0.4%	7.2%
Asian alone, percent (a)	0.6%	1.2%	1.5%	0.7%	1.3%	1.0%	1.0%	0.6%	1.0%	0.3%	0.4%
Native Hawaiian and Other Pacific Islander alone (a)	Z	Z	0.1%	0.1%	Z	0.1%	0.1%	Z	0.1%	Z	0.1%
Two or More Races	1.2%	1.3%	2.3%	2.0%	1.4%	1.9%	1.6%	1.9%	2.5%	1.4%	2.7%
Hispanic or Latino (b)	2.0%	1.9%	6.9%	3.3%	2.2%	2.4%	2.6%	3.5%	4.1%	1.3%	1.7%
White alone, not Hispanic or Latino	83.3%	89.6%	81.3%	78.7%	77.2%	70.6%	59.9%	81.7%	79.5%	60.4%	41.2%
Foreign born persons (2009-2013)	3.0%	1.7%	5.8%	2.8%	2.8%	2.3%	2.0%	3.0%	4.6%	1.1%	0.9%
Language other than English spoken at home, age 5+ (2009-2013)	4.5%	3.2%	8.5%	3.8%	5.4%	3.9%	2.4%	2.4%	6.8%	2.0%	2.0%

Source: US Census Bureau

(a) Includes persons reporting only one race // (b) Hispanics may be of any race, so also are included in applicable race categories // Z: Value greater than zero but less than half unit of measure shown

3.5 HOUSEHOLDS

	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Households (ACS 2009-2013)	9,544	27,233	23,130	9,462	8,058	13,560	12,650	6,404	12,621	6,708	2,850
Persons per household (2009-2013)	2.61	2.53	2.84	2.6	2.4	2.59	2.42	2.31	2.65	2.52	2.53
Per Capita Personal Income (PCPI) (2013)	\$47,214	\$42,314	\$56,814	\$41,278	\$73,930	\$45,759	\$33,534	\$45,680	\$38,149	\$35,020	\$34,947
Median household income (2009-2013)	\$76,548	\$57,596	\$88,409	\$68,288	\$80,976	\$63,942	\$36,261	\$48,789	\$60,287	\$46,150	\$48,428
Persons below poverty level, percent (2009-2013)	5.4%	8.2%	5.6%	7.1%	5.6%	12.0%	19.6%	14.2%	12.6%	16.0%	11.80%

Source: US Census Bureau

3.6 PER CAPITA PERSONAL INCOME (DETAIL)

	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Per capita income - 2013	\$47,214	\$42,314	\$56,814	\$41,278	\$73,930	\$45,759	\$33,534	\$45,680	\$38,149	\$35,020	\$34,947
Per capita income - 2003	\$37,645	\$40,037	\$54,652	\$33,872	\$59,461	\$40,550	\$29,801	\$37,344	\$36,435	\$34,056	\$38,495
Per capita income - 1993	\$29,205	\$31,159	\$44,433	\$29,960	\$43,994	\$30,976	\$25,582	\$26,888	\$29,609	\$27,452	\$25,976
Per capita income - 1983	\$25,305	\$25,903	\$33,761	\$22,461	\$31,881	\$28,268	\$21,270	\$23,073	\$24,701	\$20,474	\$23,278
10-year % change	25.4%	5.7%	4.0%	21.9%	24.3%	12.8%	12.5%	22.3%	4.7%	2.8%	-9.2%
20-year % change	61.7%	35.8%	27.9%	37.8%	68.0%	47.7%	31.1%	69.9%	28.8%	27.6%	34.5%
30-year % change	86.6%	63.4%	68.3%	83.8%	131.9%	61.9%	57.7%	98.0%	54.4%	71.0%	50.1%

Source: Statsamerica / US Bureau of Economic Analysis
Historic data adjusted for inflation

3.7 HOUSEHOLDS (DETAIL)

	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Total households	9,544	27,233	23,130	9,462	8,058	13,560	12,650	6,404	12,621	6,708	2,850
Average household size	2.61	2.53	2.84	2.6	2.4	2.59	2.42	2.31	2.65	2.52	2.53
Families											
Total families	7,532	19,905	17,205	6,937	6,394	10,191	7,934	4,163	9,425	4,770	1,869
Average family size	2.93	2.96	3.31	3.05	2.71	3.02	3.1	2.79	3.06	3.04	3.18
Households with own children under 18 years	2,869	7,443	7,213	2,578	2,050	3,875	2,633	1,339	3,531	1,820	526
Under 6 years only	20.4%	16.4%	13.9%	20.6%	28.6%	19.1%	14.5%	12.0%	19.1%	17.0%	16.2%
Under 6 years and 6 to 17 years	19.1%	17.5%	22.5%	22.2%	12.8%	15.2%	18.6%	10.3%	22.1%	23.8%	15.6%
6 to 17 years only	60.5%	66.1%	63.6%	57.2%	58.6%	65.7%	66.8%	77.7%	58.7%	59.2%	68.3%
Household Types											
Households with one or more people under 18 years	33.4%	30.2%	34.6%	30.7%	27.8%	32.5%	24.9%	25.5%	31.7%	32.4%	22.1%
Households with one or more people 60 years and over	39.0%	40.8%	37.8%	40.3%	44.4%	39.4%	50.0%	52.3%	44.6%	43.5%	47.8%
Householder living alone	18.1%	22.5%	20.5%	22.7%	18.2%	21.7%	33.9%	30.2%	21.3%	24.8%	30.2%
65 years and over	6.6%	9.9%	8.5%	9.1%	7.0%	8.6%	17.2%	13.1%	8.8%	10.1%	13.3%
Unmarried-Partner Households											
Same sex	0.1%	0.4%	0.4%	0.2%	0.1%	0.4%	0.2%	0.2%	0.5%	0.7%	0.2%
Opposite sex	4.5%	4.5%	4.8%	4.3%	2.6%	3.5%	3.9%	5.3%	4.8%	3.9%	4.3%

Source: US Census Bureau, American Community Survey, 5 Year Estimates (2009-2013)

3.8 HOUSING

	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Housing units, 2013	10,230	32,444	25,930	10,566	8,760	14,915	18,559	9,978	14,779	7,498	3,277
Housing Tenure											
Owner-occupied housing units	88.7%	85.0%	80.1%	85.5%	90.2%	80.6%	73.4%	75.8%	75.9%	71.8%	80.5%
Renter-occupied housing units	11.3%	15.0%	19.9%	14.5%	9.8%	19.4%	26.6%	24.2%	24.1%	28.2%	19.5%
Units in Structure											
1-unit structures	95.1%	82.3%	90.9%	93.9%	95.3%	80.9%	75.0%	78.0%	86.4%	78.2%	83.4%
2-or-more-unit structures	1.9%	3.2%	6.9%	2.3%	0.9%	7.3%	6.1%	6.1%	6.7%	4.8%	2.5%
Mobile homes and all other types of units	2.9%	14.6%	2.1%	3.8%	3.8%	11.8%	18.9%	15.9%	6.9%	17.0%	14.1%
Median value of owner-occupied housing units, 2009-2013	\$269,700	\$195,400	\$350,600	\$225,700	\$338,500	\$249,600	\$120,900	\$192,900	\$230,500	\$150,000	\$147,500
Building permits, 2013	143	385	268	84	142	123	78	52	94	29	20
Living in same house 1 year & over, percent, 2009-2013	89.4%	90.9%	90.5%	91.3%	92.5%	91.0%	92.2%	88.6%	86.4%	89.8%	94.4%

Source: US Census Bureau, American Community Survey, 5 Year Estimates (2009-2013)

3.9 RESIDENTIAL BUILDING PERMITS (2013)

	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Total Permits Filed	143	385	268	84	142	123	78	52	94	29	20
Cost (\$000)	\$36,334	\$66,332	\$67,651	\$15,606	\$40,813	\$29,703	\$15,494	\$14,195	\$17,508	\$5,527	\$4,422
Single Family	143	285	266	76	142	123	78	52	94	27	20
Cost (\$000)	\$36,334	\$60,332	\$67,475	\$14,406	\$40,813	\$29,703	\$15,494	\$14,195	\$17,508	\$5,271	\$4,422
Two Family	0	0	2	8	0	0	0	0	0	2	0
Cost (\$000)	\$0	\$0	\$175	\$1,200	\$0	\$0	\$0	\$0	\$0	\$256	\$0
Three & Four Family	0	0	0	0	0	0	0	0	0	0	0
Cost (\$000)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Five Families and More	0	100	0	0	0	0	0	0	0	0	0
Cost (\$000)	\$0	\$6,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Source: US Census Bureau

3.10 GEOGRAPHIC MOBILITY

	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Total	27,901	68,637	65,348	25,593	21,409	34,959	31,922	14,791	33,672	18,283	7,156
Same house 1 year ago	24,941	62,366	59,165	23,355	19,811	31,812	29,427	13,101	29,089	16,419	6,758
Moved within same county	577	2,319	1,866	567	397	1,077	1,165	750	1,652	726	119
Moved from different county within same state	1,845	3,074	3,011	1,297	882	1,322	905	752	2,487	945	198
Moved from different state	521	758	1,118	374	307	592	362	188	381	164	59
Moved from abroad	17	120	188	-	12	156	63	-	63	29	22

Source: US Census Bureau, American Community Survey, 5 Year Estimates (2009-2013)

Geographic Mobility (%)	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Same house 1 year ago	89.4%	90.9%	90.5%	91.3%	92.5%	91.0%	92.2%	88.6%	86.4%	89.8%	94.4%
Moved within same county	2.1%	3.4%	2.9%	2.2%	1.9%	3.1%	3.6%	5.1%	4.9%	4.0%	1.7%
Moved from different county within same state	6.6%	4.5%	4.6%	5.1%	4.1%	3.8%	2.8%	5.1%	7.4%	5.2%	2.8%
Moved from different state	1.9%	1.1%	1.7%	1.5%	1.4%	1.7%	1.1%	1.3%	1.1%	0.9%	0.8%
Moved from abroad	0.1%	0.2%	0.3%	0.0%	0.1%	0.4%	0.2%	0.0%	0.2%	0.2%	0.3%

Source: US Census Bureau, American Community Survey, 5 Year Estimates (2009-2013)

4 INDUSTRY

4.1 AVERAGE ESTABLISHMENTS

4.1.1 Average Establishments: Totals

	Industry Code	Powhatan County*	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Total, All Industries*	00	727	1,964	2,268	487	740	713	1,026	532	844	299	198
Accommod. & Food Services	72	25	95	114	21	28	51	67	25	55	9	3
Admin. & Support & Waste Mgmt	56	44	102	97	48	75	46	36	18	34	12	16
Agriculture, Forestry, Fishing & Hunting	11	8	19	77	9	16	24	34	21	31	28	13
Arts, Entertainm. & Recreation	71	13	20	35	9	18	7	12	5	8	5	5
Construction	23	199	295	313	73	116	88	90	77	107	33	22
Educational Services	61	10	13	28	9	10	7	7	5	10	3	2
Finance and Insurance*	52	28	101	76	18	36	35	50	14	35	10	1
Health Care & Social Assist.	62	79	398	418	113	80	83	233	146	183	61	55
Information	51	10	22	25	8	10	6	14	3	7	3	2
Mgmt of Companies	55	2	7	13	n/a	9	3	8	4	1	1	1
Manufacturing	31-33	22	86	66	14	20	24	31	27	26	16	15
Mining, Quarrying, Oil & Gas Extraction	21	1	n/a	5	1	3	n/a	1	2	n/a	1	2
Other Services (except Public Admin.)	81	60	150	261	32	78	74	87	36	79	17	16
Prof., Scientific & Techn. Services	54	88	180	292	41	88	66	50	43	74	11	3

Avg. Establishments: Totals Cont.	Industry Code	Powha- tan County*	Bedfor d County	Fauquier County	Fluvanna County	Gooch- land County	Isle of Wight County	Mecklen- burg County	Nelson County	Orange County	Southam- pton County	Charles City County
Public Administration	92	20	49	36	11	17	18	33	11	15	20	9
Real Estate, Rental & Leasing	53	17	87	73	10	17	24	31	17	26	8	2
Retail Trade	44-45	47	193	214	31	51	95	154	43	96	24	8
Transport. & Warehousing	48-49	12	46	59	15	23	35	47	22	27	18	13
Utilities	22	1	8	2	4	n/a	3	3	4	2	2	1
Wholesale Trade	42	41	93	64	20	45	24	38	9	28	17	9

Source: VEC, Quarterly Census of Employment and Wages, 3rd Qu. 2014

n/a - No Data provided because industry not represented in community

*Number of establishments for Powhatan is incorrect because Anthem is erroneously included as an employer in the county; official revised data from VEC not available yet.

4.1.2 Average Establishments: Percent

	Industry Code	Powhatan County *	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Total, All Industries*	00	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Accommod. & Food Services	72	3.4%	4.8%	5.0%	4.3%	3.8%	7.2%	6.5%	4.7%	6.5%	3.0%	1.5%
Admin. & Support & Waste Mgmt	56	6.1%	5.2%	4.3%	9.9%	10.1%	6.5%	3.5%	3.4%	4.0%	4.0%	8.1%
Agric., Forestry, Fish., Hunting	11	1.1%	1.0%	3.4%	1.8%	2.2%	3.4%	3.3%	3.9%	3.7%	9.4%	6.6%
Arts, Entertainm. & Recreation	71	1.8%	1.0%	1.5%	1.8%	2.4%	1.0%	1.2%	0.9%	0.9%	1.7%	2.5%
Construction	23	27.4%	15.0%	13.8%	15.0%	15.7%	12.3%	8.8%	14.5%	12.7%	11.0%	11.1%
Educational Services	61	1.4%	0.7%	1.2%	1.8%	1.4%	1.0%	0.7%	0.9%	1.2%	1.0%	1.0%
Finance and Insurance*	52	3.9%	5.1%	3.4%	3.7%	4.9%	4.9%	4.9%	2.6%	4.1%	3.3%	0.5%
Health Care & Social Assist.	62	10.9%	20.3%	18.4%	23.2%	10.8%	11.6%	22.7%	27.4%	21.7%	20.4%	27.8%
Information	51	1.4%	1.1%	1.1%	1.6%	1.4%	0.8%	1.4%	0.6%	0.8%	1.0%	1.0%
Mgmt of Companies	55	0.3%	0.4%	0.6%	n/a	1.2%	0.4%	0.8%	0.8%	0.1%	0.3%	0.5%
Manufacturing	31-33	3.0%	4.4%	2.9%	2.9%	2.7%	3.4%	3.0%	5.1%	3.1%	5.4%	7.6%
Mining, Quarrying, Oil & Gas Extraction	21	0.1%	n/a	0.2%	0.2%	0.4%	n/a	0.1%	0.4%	n/a	0.3%	1.0%
Other Services (except Public Admin.)	81	8.3%	7.6%	11.5%	6.6%	10.5%	10.4%	8.5%	6.8%	9.4%	5.7%	8.1%
Prof., Scientific & Techn. Serv	54	12.1%	9.2%	12.9%	8.4%	11.9%	9.3%	4.9%	8.1%	8.8%	3.7%	1.5%
Public Administration	92	2.8%	2.5%	1.6%	2.3%	2.3%	2.5%	3.2%	2.1%	1.8%	6.7%	4.5%
Real Estate, Rental & Leasing	53	2.3%	4.4%	3.2%	2.1%	2.3%	3.4%	3.0%	3.2%	3.1%	2.7%	1.0%
Retail Trade	44-45	6.5%	9.8%	9.4%	6.4%	6.9%	13.3%	15.0%	8.1%	11.4%	8.0%	4.0%
Transport. & Warehousing	48-49	1.7%	2.3%	2.6%	3.1%	3.1%	4.9%	4.6%	4.1%	3.2%	6.0%	6.6%

Utilities	22	0.1%	0.4%	0.1%	0.8%	n/a	0.4%	0.3%	0.8%	0.2%	0.7%	0.5%
Wholesale Trade	42	5.6%	4.7%	2.8%	4.1%	6.1%	3.4%	3.7%	1.7%	3.3%	5.7%	4.5%

Source: VEC, Quarterly Census of Employment and Wages, 3rd Qu. 2014

n/a - No Data provided because industry not represented in community // *Number of establishments for Powhatan is incorrect because Anthem is erroneously included as an employer in the county; official revised data from VEC not available yet.

4.2 AVERAGE EMPLOYMENT

4.2.1 Average Employment: Totals

	Industry Code	Powhatan County*	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Total, All Industries*	0	8,038	18,773	21,370	4,450	14,470	10,536	11,218	3,882	9,029	3,532	1,615
Accommod. & Food Services	72	438	1,376	2,296	273	483	788	1,162	704	726	119	19
Admin., Support & Waste Mgmt	56	226	1,535	551	663	508	445	518	92	375	35	98
Agric., Forestry, Fish., Hunting	11	28	121	408	78	77	197	251	321	471	178	69
Arts, Entertainm. & Recreation	71	268	363	484	107	458	84	101	14	n.d.	33	53
Construction	23	1,233	1,495	2,266	455	1,129	439	615	281	438	101	202
Educational Services	61	737	1,794	2,452	n.d.	690	n.d.	645	n.d.	1,202	n.d.	174
Finance and Insurance*	52	n.d.	430	520	50	n.d.	216	276	44	137	35	n.d.
Health Care & Social Assist.	62	313	2,352	2,857	314	670	835	2,091	379	939	462	71
Information	51	28	279	157	17	n.d.	25	244	27	34	n.d.	n.d.
Mgmt of Companies	55	n.d.	72	175	n/a	1,649	180	126	10	n.d.	n.d.	n.d.
Manufacturing	31-33	260	2,059	900	93	283	2,971	1,220	520	1,050	398	372
Mining, Quarrying, Oil & Gas Extraction	21	n.d.	n/a	55	n.d.	70	n/a	n.d.	n.d.	n/a	n.d.	n.d.
Other Serv. (exc. Public Admin.)	81	272	896	1,072	177	372	372	392	244	420	42	67
Prof., Scientific & Techn. Serv.	54	391	1,256	1,661	96	479	373	271	151	245	45	18
Public Administration	92	1,572	556	1,077	558	623	547	566	167	508	852	146
Real Estate, Rental & Leasing	53	32	271	357	18	188	89	109	40	317	40	n.d.
Retail Trade	44-45	604	2,268	2,868	338	504	899	1,554	274	1,245	226	24
Transport. & Warehousing	48-49	131	406	736	102	124	614	735	80	206	147	189
Utilities	22	n.d.	79	n.d.	101	n/a	n.d.	117	n.d.	n.d.	n.d.	n.d.
Wholesale Trade	42	249	1,165	427	99	624	602	211	18	515	163	62

Source: VEC, Quarterly Census of Employment and Wages, 3rd Qu. 2014

n.d. - Data confidential and not disclosed // n/a - No Data provided because industry not represented in community // *Average employment for Powhatan for "All Industries" is incorrect because Anthem is erroneously included as an employer in the county; official revised data from VEC not available yet but total employment should be about 1,000 lower.

4.2.2 Average Employment: Percent

	Indus- try Code	Powha- tan County*	Bedford County	Fauquier County	Fluvanna County	Gooch- land County	Isle of Wight County	Meckle- nburg County	Nelson County	Orange County	Southam- pton County	Charles City County
Total, All Industries*	0	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Accommod. & Food Services	72	5.4%	7.3%	10.7%	6.1%	3.3%	7.5%	10.4%	18.1%	8.0%	3.4%	1.2%
Admin., Support & Waste Mgmt	56	2.8%	8.2%	2.6%	14.9%	3.5%	4.2%	4.6%	2.4%	4.2%	1.0%	6.1%
Agric., Forestry, Fish., Hunting	11	0.3%	0.6%	1.9%	1.8%	0.5%	1.9%	2.2%	8.3%	5.2%	5.0%	4.3%
Arts, Entertainm. & Recreation	71	3.3%	1.9%	2.3%	2.4%	3.2%	0.8%	0.9%	0.4%	n.d.	0.9%	3.3%
Construction	23	15.3%	8.0%	10.6%	10.2%	7.8%	4.2%	5.5%	7.2%	4.9%	2.9%	12.5%
Educational Services	61	9.2%	9.6%	11.5%	n.d.	4.8%	n.d.	5.7%	n.d.	13.3%	n.d.	10.8%
Finance and Insurance*	52	n.d.	2.3%	2.4%	1.1%	n.d.	2.1%	2.5%	1.1%	1.5%	1.0%	n.d.
Health Care & Social Assist.	62	3.9%	12.5%	13.4%	7.1%	4.6%	7.9%	18.6%	9.8%	10.4%	13.1%	4.4%
Information	51	0.3%	1.5%	0.7%	0.4%	n.d.	0.2%	2.2%	0.7%	0.4%	n.d.	n.d.
Mgmt of Companies	55	n.d.	0.4%	0.8%	n/a	11.4%	1.7%	1.1%	0.3%	n.d.	n.d.	n.d.
Manufacturing	31-33	3.2%	11.0%	4.2%	2.1%	2.0%	28.2%	10.9%	13.4%	11.6%	11.3%	23.0%
Mining, Quarrying, Oil & Gas Extraction	21	n.d.	n/a	0.3%	n.d.	0.5%	n/a	n.d.	n.d.	n/a	n.d.	n.d.
Other Services (except Public Admin.)	81	3.4%	4.8%	5.0%	4.0%	2.6%	3.5%	3.5%	6.3%	4.7%	1.2%	4.1%
Prof., Scientific & Techn. Serv	54	4.9%	6.7%	7.8%	2.2%	3.3%	3.5%	2.4%	3.9%	2.7%	1.3%	1.1%
Public Administration	92	19.6%	3.0%	5.0%	12.5%	4.3%	5.2%	5.0%	4.3%	5.6%	24.1%	9.0%
Real Estate, Rental & Leasing	53	0.4%	1.4%	1.7%	0.4%	1.3%	0.8%	1.0%	1.0%	3.5%	1.1%	n.d.
Retail Trade	44-45	7.5%	12.1%	13.4%	7.6%	3.5%	8.5%	13.9%	7.1%	13.8%	6.4%	1.5%
Transport. & Warehousing	48-49	1.6%	2.2%	3.4%	2.3%	0.9%	5.8%	6.6%	2.1%	2.3%	4.2%	11.7%
Utilities	22	n.d.	0.4%	n.d.	2.3%	n/a	n.d.	1.0%	n.d.	n.d.	n.d.	n.d.
Wholesale Trade	42	3.1%	6.2%	2.0%	2.2%	4.3%	5.7%	1.9%	0.5%	5.7%	4.6%	3.8%

Source: VEC, Quarterly Census of Employment and Wages, 3rd Qu. 2014

n.d. - Data confidential and not disclosed // n/a - No Data provided because industry not represented in community // **Average employment for Powhatan for "All Industries" is incorrect because Anthem is erroneously included as an employer in the county; official revised data from VEC not available yet but total employment should be about 1,000 lower, impacting % calculations.

4.3 AVERAGE WEEKLY WAGE

	Indus- try Code	Powha- tan County	Bedford County	Fauquier County	Fluvanna County	Gooch- land County	Isle of Wight County	Mecklen- burg County	Nelson County	Orange County	Southam- pton County	Charles City County
Total, All Industries	00	\$832	\$664	\$862	\$693	\$1,286	\$721	\$578	\$557	\$658	\$629	\$702
Accommod. & Food Services	72	\$281	\$249	\$308	\$263	\$357	\$276	\$238	\$452	\$305	\$250	\$260
Admin. & Support & Waste Mgmt	56	\$494	\$420	\$653	\$673	\$672	\$624	\$474	\$568	\$552	\$492	\$575
Agriculture, Forestry, Fishing & Hunting	11	\$337	\$691	\$678	\$740	\$505	\$694	\$572	\$516	\$674	\$594	\$665
Arts, Entertainm. & Recr.	71	\$375	\$392	\$425	\$292	\$507	\$227	\$307	\$331	n.d.	\$251	\$291
Construction	23	\$791	\$695	\$891	\$710	\$951	\$680	\$759	\$586	\$674	\$699	\$852
Educational Services	61	\$738	\$630	\$778	n.d.	\$738	n.d.	\$545	n.d.	\$685	n.d.	\$580
Finance and Insurance	52	n.d.	\$866	\$1,292	\$875	n.d.	\$937	\$717	\$795	\$771	\$922	n.d.
Health Care & Social Assist.	62	\$763	\$754	\$811	\$695	\$605	\$500	\$643	\$591	\$521	\$542	\$361
Information	51	\$1,263	\$897	\$1,017	\$611	n.d.	\$1,078	\$725	\$734	\$846	n.d.	n.d.
Mgmt of Companies	55	n.d.	\$1,393	\$1,240	n/a	\$1,708	\$5,289	\$1,160	\$1,525	n.d.	n.d.	n.d.
Manufacturing	31-33	\$806	\$925	\$798	\$858	\$1,191	\$722	\$653	\$525	\$794	\$792	\$700
Mining, Quarrying, Oil & Gas Extraction	21	n.d.	n/a	\$1,193	n.d.	\$1,063	n/a	n.d.	n.d.	n/a	n.d.	n.d.
Other Services (except Public Admin.)	81	\$600	\$572	\$666	\$406	\$773	\$474	\$393	\$551	\$542	\$313	\$533
Prof., Scientific & Techn. Serv.	54	\$1,101	\$754	\$1,560	\$996	\$1,163	\$1,071	\$984	\$781	\$922	\$626	\$1,134
Public Administration	92	\$763	\$663	\$1,075	\$767	\$809	\$710	\$749	\$656	\$716	\$713	\$687
Real Estate, Rental & Leasing	53	\$756	\$606	\$993	\$739	\$838	\$611	\$506	\$468	\$774	\$524	n.d.
Retail Trade	44-45	\$468	\$458	\$616	\$375	\$483	\$371	\$412	\$345	\$473	\$317	\$410
Transport. & Warehousing	48-49	\$840	\$831	\$2,312	\$1,099	\$620	\$608	\$559	\$648	\$975	\$798	\$874
Utilities	22	n.d.	\$821	n.d.	\$1,744	n/a	n.d.	\$1,527	n.d.	n.d.	n.d.	n.d.
Wholesale Trade	42	\$890	\$1,071	\$1,009	\$994	\$1,287	\$851	\$776	\$596	\$1,179	\$783	\$1,099

Source: VEC, Quarterly Census of Employment and Wages, 3rd Qu. 2014

n.d. - Data confidential and not disclosed // n/a - No Data provided because industry not represented in community

Given the erroneous inclusion of Anthem in the Powhatan QCEW database, the average weekly wage was artificially raised to \$832. While VEC has not released an official update yet, County wages without Anthem would likely be lowered to around \$815.

4.4 ESTIMATED EARNINGS, POWHATAN COUNTY (MAY 2012)

Occupation	Median Wage	Mean Wage	Median Salary	Mean Salary
Laborers and Freight, Stock, and Material Movers, Hand	\$11.59	\$12.77	\$24,096	\$26,562
Industrial Truck and Tractor Operators	\$14.50	\$15.02	\$30,172	\$31,240
Heavy and Tractor-Trailer Truck Drivers	\$17.90	\$18.82	\$37,234	\$39,162
First-Line Supervisors of Production and Operating Workers	\$28.04	\$29.15	\$58,317	\$60,644
Maintenance and Repair Workers, General	\$17.37	\$18.10	\$36,122	\$37,654
Industrial Machinery Mechanics	\$23.12	\$23.77	\$48,083	\$49,448
Office Clerks, General	\$13.79	\$14.45	\$28,677	\$30,045
Secretaries/Admin. Assistants, Except Legal, Medical & Execut.	\$16.06	\$16.63	\$33,407	\$34,594
Receptionists and Information Clerks	\$13.39	\$13.43	\$27,843	\$27,923
Customer Service Representatives	\$15.57	\$16.30	\$32,393	\$33,915
Bookkeeping, Accounting, and Auditing Clerks	\$17.49	\$18.14	\$36,374	\$37,739
First-Line Supervisors of Office and Administrative Support Workers	\$25.80	\$27.64	\$53,657	\$57,501
Network and Computer Systems Administrators*	\$40.56	\$40.59	\$84,377	\$84,421
Software Developers, Systems Software	\$46.14	\$47.96	\$95,968	\$99,769
Software Developers, Applications	\$42.52	\$43.70	\$88,444	\$90,893
Computer Programmers	\$39.16	\$39.96	\$81,459	\$83,110
Computer Systems Analysts	\$37.83	\$38.74	\$78,684	\$80,574
Accountants and Auditors	\$30.41	\$33.64	\$63,269	\$69,979
Management Analysts	\$38.98	\$42.50	\$81,075	\$88,385
Purchasing Agents, Except Wholesale, Retail, and Farm Products	\$31.19	\$31.68	\$64,872	\$65,893

Source: Bureau of Labor Statistics, Virginia Economic Development Partnership

4.5 POWHATAN COUNTY: INDUSTRY BY SIZE

4.5.1 Number of Establishments by Employment Level

# of Establishments	Employment Level									
	NAICS	0-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+*
Total, All Industries*	0	488	105	63	51	11	***	3	1	***
Agriculture, Forestry, Fishing and Hunting	11	5	***	***	0	0	0	0	0	0
Mining, Quarrying, and Oil and Gas Extraction	21	0	0	0	***	0	0	0	0	0
Utilities	22	0	0	***	0	0	0	0	0	0
Construction	23	144	27	12	13	***	***	0	0	0
Manufacturing	31-33	11	3	3	4	***	0	0	0	0
Wholesale Trade	42	32	4	***	***	***	0	0	0	0
Retail Trade	44-45	22	12	6	5	***	***	0	0	0
Transportation and Warehousing	48-49	6	***	***	***	0	0	0	0	0
Information	51	7	3	0	0	0	0	0	0	0
Finance and Insurance*	52	19	6	***	0	0	0	0	0	***
Real Estate and Rental and Leasing	53	15	***	0	0	0	0	0	0	0
Professional, Scientific, and Technical Services	54	70	11	3	3	***	0	0	0	0
Management of Companies and Enterprises	55	***	0	0	0	0	0	0	0	0
Administrative and Support and Waste Mgmt	56	31	4	8	***	0	0	0	0	0
Educational Services	61	5	***	***	0	***	0	0	1	0
Health Care and Social Assistance	62	61	7	7	4	0	0	0	0	0
Arts, Entertainment, and Recreation	71	5	***	***	***	***	0	0	0	0
Accommodation and Food Services	72	4	4	6	11	0	0	0	0	0
Other Services (except Public Administration)	81	42	12	5	0	***	0	0	0	0
Public Administration	92	7	2	3	2	1	2	3	0	0

Source: VEC, Quarterly Census of Employment and Wages, 3rd Qu. 2014

*** indicates disclosure suppression.

*Data point refers to erroneous inclusion of Anthem as an employer in Powhatan; official revised data from VEC not available yet.

4.5.2 Average Weekly Wage by Employment Level

Average Weekly Wage	NAICS Code	Employment Level								
		0-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+*
Total, All Industries*	0	\$787	\$714	\$677	\$683	\$661	***	\$752	\$783	***
Agriculture, Forestry, Fishing and Hunting	11	\$497	***	***	\$0	\$0	\$0	\$0	\$0	\$0
Mining, Quarrying, and Oil and Gas Extraction	21	\$0	\$0	\$0	***	\$0	\$0	\$0	\$0	\$0
Utilities	22	\$0	\$0	***	\$0	\$0	\$0	\$0	\$0	\$0
Construction	23	\$660	\$701	\$760	\$816	***	***	\$0	\$0	\$0
Manufacturing	31-33	\$1,288	\$678	\$673	\$933	***	\$0	\$0	\$0	\$0
Wholesale Trade	42	\$1,286	\$960	***	***	***	\$0	\$0	\$0	\$0
Retail Trade	44-45	\$589	\$546	\$526	\$512	***	***	\$0	\$0	\$0
Transportation and Warehousing	48-49	\$478	***	***	***	\$0	\$0	\$0	\$0	\$0
Information	51	\$1,960	\$659	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Finance and Insurance*	52	\$1,214	\$1,097	***	\$0	\$0	\$0	\$0	\$0	***
Real Estate and Rental and Leasing	53	\$746	***	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Professional, Scientific, and Technical Services	54	\$1,064	\$1,014	\$1,109	\$676	***	\$0	\$0	\$0	\$0
Management of Companies and Enterprises	55	***	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Administrative and Support and Waste Mgmt	56	\$504	\$541	\$518	***	\$0	\$0	\$0	\$0	\$0
Educational Services	61	\$426	***	***	\$0	***	\$0	\$0	\$783	\$0
Health Care and Social Assistance	62	\$350	\$718	\$732	\$1,052	\$0	\$0	\$0	\$0	\$0
Arts, Entertainment, and Recreation	71	\$166	***	***	***	***	\$0	\$0	\$0	\$0
Accommodation and Food Services	72	\$468	\$235	\$254	\$289	\$0	\$0	\$0	\$0	\$0
Other Services (except Public Administration)	81	\$812	\$748	\$760	\$0	***	\$0	\$0	\$0	\$0
Public Administration	92	\$1,023	\$840	\$897	\$867	\$821	\$746	\$752	\$0	\$0

Source: VEC, Quarterly Census of Employment and Wages, 3rd Qu. 2014

*** indicates disclosure suppression.

*Data point refers to erroneous inclusion of Anthem as an employer in Powhatan; official revised data from VEC not available yet.

4.6 LOCATION QUOTIENT

Location Quotient (LQ): LQs are ratios that allow an area's distribution of employment by industry to be compared to a reference or base area's distribution. The analysis area are the counties listed and the reference/base area is Virginia. If an LQ is equal to 1, then the industry has the same share of its area employment as it does in the reference area. An LQ greater than 1 indicates an industry with a greater share of the local area employment than is the case in the reference area.

Industry	NAICS Code	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Total, All Industries	00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Accommodation and Food Services	72	0.67	0.71	1.13	0.84	0.38	0.88	1.10	n.d.	0.93	0.34	0.17
Admin./Support, Waste Mgmt	56	0.48	1.50	0.44	2.28	0.62	0.69	0.70	0.38	0.60	0.14	0.70
Agric., Forestry, Fishing and Hunting	11	1.22	2.25	6.42	4.07	1.81	6.00	6.17	21.81	16.49	13.31	13.94
Arts, Entertainment, and Recreation	71	1.64	1.03	1.31	0.60	1.79	0.43	0.39	0.22	0.92	n.d.	1.69
Construction	23	2.95	1.72	1.93	1.54	1.63	0.68	0.92	1.24	0.92	0.77	2.25
Educational Services	61	1.09	1.28	1.29	n.d.	0.58	n.d.	0.77	n.d.	1.51	n.d.	1.32
Finance and Insurance	52	n.d.	0.56	0.67	0.36	n.d.	0.58	0.68	0.37	0.74	0.29	n.d.
Health Care and Social Assistance	62	0.32	0.75	1.09	0.61	0.42	0.65	1.50	0.75	0.81	0.86	0.31
Information	51	0.15	0.67	0.34	0.15	n.d.	0.14	1.06	0.40	0.18	0.83	n.d.
Management of Companies and Enterprises	55	n.d.	0.22	0.40	n/a	6.03	0.87	n.d.	0.09	n.d.	n.d.	n.d.
Manufacturing	31-33	0.45	1.36	0.59	0.34	0.32	4.58	1.57	1.78	1.64	2.10	3.37
Mining, Quarrying, and Oil and Gas Extraction	21	n.d.	n/a	1.10	n.d.	2.34	0.00	n.d.	n.d.	n.d.	n.d.	6.25
Other Services (except Public Administration)	81	0.94	1.15	1.30	1.02	0.80	0.98	0.92	1.68	1.24	0.38	1.09
Professional, Scientific, and Technical Services	54	0.39	0.69	0.71	0.17	0.34	0.33	0.25	0.36	0.26	0.11	0.13

Industry	NAICS Code	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Public Administration	92	3.10	0.45	0.77	1.95	0.72	0.78	0.77	0.58	0.81	3.55	1.20
Real Estate and Rental and Leasing	53	0.31	1.03	1.24	0.24	0.79	0.54	0.71	0.84	2.23	0.78	0.19
Retail Trade	44-45	0.67	1.10	1.18	0.68	0.35	0.83	1.21	0.62	1.11	0.49	n.d.
Transportation and Warehousing	48-49	0.40	0.66	1.07	0.83	0.30	1.06	2.02	0.63	0.74	1.15	3.85
Unclassified establishments	99	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Utilities	22	n.d.	n.d.	n.d.	5.28	n/a	n.d.	2.11	n.d.	n.d.	n.d.	n.d.
Wholesale Trade	42	1.10	2.46	0.69	0.84	1.35	n.d.	0.55	0.13	1.99	1.48	1.32

Source: LQ calculated using Virginia Employment Commission, QCEW 2013 annual employment data

n.d. - Not disclosable - employment data not disclosed; LQ can therefore not be calculated

n/a - Not applicable, the data does not exist

4.7 NEW STARTUP FIRMS (POWHATAN COUNTY)

Year	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Total
2014	11	9	6	TBD	
2013	7	4	6	7	24
2012	12	10	10	5	37
2011	8	10	7	7	32
2010	12	4	9	2	27
2009	1	8	6	4	19
2008	11	13	6	7	37
2007	21	9	10	4	44
2006	15	10	9	3	37
2005	11	8	3	13	35

Source: VEC, Quarterly Census of Employment and Wages, 3rd Qu. 2014

The following criteria was used to define new startup firms:

1. Setup and liability date both occurred during the quarter
2. Establishment had no predecessor UI Account Number
3. Private Ownership
4. Average employment is less than 250
5. For multi-unit establishments, the parent company must also meet the above criteria.

5 LABOR FORCE

5.1 LABOR FORCE OVERVIEW

	Powhatan County	Extended Labor Market	Total Labor Market	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Labor Force (2014)	13,761	568,743	582,504	38,497	36,018	13,402	10,533	18,903	12,679	7,519	16,234	9,157	3,819
Labor Force Participation (2009-2013)	58.2%	67.1%	n/a	63.6%	69.0%	60.6%	56.9%	66.2%	51.2%	57.9%	59.6%	58.2%	60.9%
Unemployed (2014)	623	29,879	30,502	1,960	1,625	572	500	996	982	364	848	459	221
Unemployment Rate (2014)	4.5%	5.3%		5.1%	4.5%	4.3%	4.7%	5.3%	7.7%	4.8%	5.2%	5.0%	5.8%
Labor Force (3/2015)	13,681	n/a		38,585	35,867	13,578	10,474	18,693	12,638	7,583	16,084	9,017	3,794
Unemployed (3/2015)	605	n/a		1,903	1,580	556	490	957	882	347	837	419	222
Unemployment Rate (3/2015)	4.4%	4.9%		4.9%	4.4%	4.1%	4.7%	5.1%	7.0%	4.6%	5.2%	4.6%	5.9%
Underemployed (3rd Qu. 2014)	1,681	65,313	66,994										
Additional Labor Resources	40,583												
<i>High School graduates Not Continuing (2012-13)</i>	36												
<i>Two-Year College Graduates (Spring 2013)</i>	3,373												
<i>Two-Year College Enrollees (Fall 2013)</i>	28,706												
<i>Other College and University Graduates (Spring 2013)</i>	8,468												
Veterans (2009-2013)	2,390	n/a	n/a	7,104	6,424	2,283	2,026	4,170	2,884	1,327	3,541	2,173	706

Source: Virginia Employment Commission, LAUS; U.S. Census; Virginia Economic Development Partnership (Extended Labor Market data)

Extended Labor Market includes all communities surrounding Powhatan County

5.2 LABOR FORCE – DETAIL (2013)

	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Total Labor Force	14,322	34,743	36,114	13,987	11,402	18,784	12,255	7,627	15,709	7,764	3,755
5-year % change	-1.8%	-3.4%	-4.6%	-1.4%	-0.6%	-1.8%	-9.1%	-5.7%	0.1%	-4.4%	-3.5%
10-year % change	13.4%	5.6%	10.1%	18.4%	18.2%	14.1%	-11.1%	5.4%	13.0%	1.3%	-0.6%
Employed	13,619	32,791	34,445	13,373	10,872	17,727	11,044	7,234	14,772	7,220	3,527
5-year % change	-3.4%	-5.5%	-5.9%	-2.5%	-1.9%	-3.7%	-12.3%	-7.2%	-1.4%	-6.6%	-4.6%
10-year % change	11.3%	4.0%	8.4%	17.2%	16.6%	11.7%	-11.6%	3.7%	10.6%	-1.5%	-1.6%
Unemployed	703	1,952	1,669	614	530	1,057	1,211	393	937	544	228
5-year % change	43.2%	53.0%	31.6%	30.9%	39.1%	50.1%	37.0%	35.1%	30.1%	39.1%	16.9%
10-year % change	76.6%	43.8%	63.9%	52.0%	64.6%	80.1%	-5.8%	49.4%	68.8%	62.4%	20.0%
Unemployment Rate	4.9%	5.6%	4.6%	4.4%	4.6%	5.6%	9.9%	5.2%	6.0%	7.0%	6.1%
5-year % change	44.1%	60.0%	39.4%	33.3%	39.4%	51.4%	50.0%	44.4%	30.4%	45.8%	22.0%
10-year % change	53.1%	36.6%	48.4%	29.4%	39.4%	55.6%	6.5%	44.4%	50.0%	59.1%	22.0%

Source: Statsamerica, US Bureau Labor Statistics

5.3 POWHATAN COUNTY LABOR FORCE (12 MONTH COMPARISON)

Time Period	Labor Force	Unemployed	Unemployment Rate
January, 2015	13,717	598	4.4%
December, 2014	14,449	576	4.0%
November, 2014	14,567	599	4.1%
October, 2014	14,666	650	4.4%
September, 2014	14,567	685	4.7%
August, 2014	14,598	720	4.9%
July, 2014	14,860	706	4.8%
June, 2014	14,855	703	4.7%
May, 2014	14,889	723	4.9%
April, 2014	14,737	593	4.0%
March, 2014	14,770	678	4.6%
February, 2014	14,634	677	4.6%
January, 2014	14,491	685	4.7%

Source: Virginia Employment Commission, Local Area Unemployment Statistics

Not seasonally adjusted Labor Force, Employment and Unemployment data.

5.4 EDUCATIONAL ATTAINMENT: 2013

	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
High school graduate or higher, % of persons age 25+ (2009-13)	85.9%	87.6%	91.4%	85.5%	87.4%	86.1%	76.9%	80.8%	85.0%	78.0%	75.9%
Bachelor's degree or higher, % of persons age 25+ (2009-13)	27.6%	25.0%	33.2%	28.8%	38.0%	25.5%	13.7%	26.7%	22.2%	13.6%	13.9%
Educational Attainment (Detail)											
Total Population 25 and Older	20,038	49,442	44,780	18,372	16,011	25,030	23,567	11,110	23,951	13,276	5,450
Less Than 9th Grade	867	2,012	1,426	883	701	1,325	2,094	983	1,167	1,111	451
9th to 12th No Diploma	1,955	4,119	2,419	1,780	1,318	2,158	3,357	1,155	2,434	1,816	860
High School Grad (inc. equiv.)	5,690	16,112	12,351	5,177	4,047	7,183	8,320	3,605	8,144	4,531	2,222
Some College, No Degree	4,354	10,881	10,178	3,811	2,846	5,898	4,984	1,849	5,400	3,095	916
Associate Degree	1,648	3,972	3,517	1,428	1,013	2,078	1,577	554	1,481	913	242
Bachelor's Degree	3,776	8,202	9,169	3,428	3,595	4,059	1,949	1,730	3,382	1,271	438
Graduate, Prof./ Doct. Degree	1,748	4,144	5,720	1,865	2,491	2,329	1,286	1,234	1,943	539	321
Educational Attainment (as % of Population 25 and Older)											
Total Population 25 and Older	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Less Than 9th Grade	4.3%	4.1%	3.2%	4.8%	4.4%	5.3%	8.9%	8.8%	4.9%	8.4%	8.3%
9th to 12th No Diploma	9.8%	8.3%	5.4%	9.7%	8.2%	8.6%	14.2%	10.4%	10.2%	13.7%	15.8%
High School Grad (inc. equiv.)	28.4%	32.6%	27.6%	28.2%	25.3%	28.7%	35.3%	32.4%	34.0%	34.1%	40.8%
Some College, No Degree	21.7%	22.0%	22.7%	20.7%	17.8%	23.6%	21.1%	16.6%	22.5%	23.3%	16.8%
Associate Degree	8.2%	8.0%	7.9%	7.8%	6.3%	8.3%	6.7%	5.0%	6.2%	6.9%	4.4%
Bachelor's Degree	18.8%	16.6%	20.5%	18.7%	22.5%	16.2%	8.3%	15.6%	14.1%	9.6%	8.0%
Graduate, Prof./Doct. Degree	8.7%	8.4%	12.8%	10.2%	15.6%	9.3%	5.5%	11.1%	8.1%	4.1%	5.9%

Source: Statsamerica, US Census Bureau, American Community Survey, 5 Year Estimates (2009-2013)

5.5 POWHATAN JOB CANDIDATES

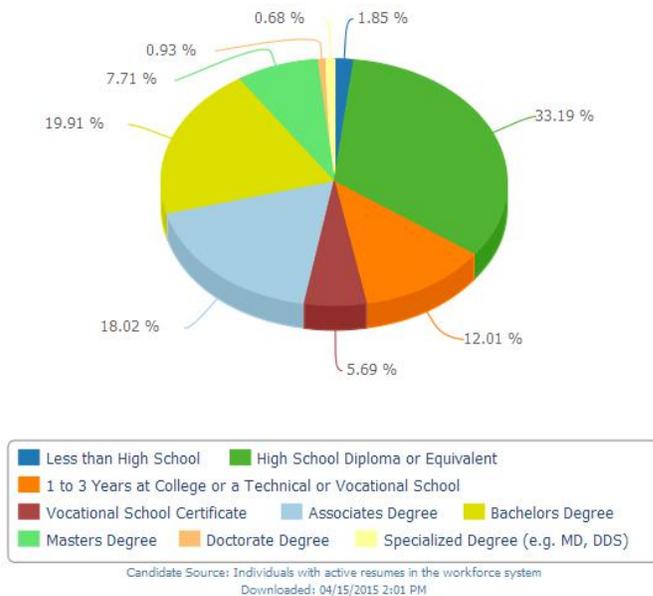
5.5.1 Education Level

The table below shows the education levels of potential candidates in Powhatan County, Virginia on April 14, 2015.

Minimum Education Level	Candidates	Percent
Less than High School	321	1.85%
High School Diploma or Equivalent	5,774	33.19%
1 to 3 Years at College or a Technical or Vocational School	2,090	12.02%
Vocational School Certificate	989	5.69%
Associates Degree	3,135	18.02%
Bachelor’s Degree	3,464	19.91%
Master’s Degree	1,341	7.71%
Doctorate Degree	162	0.93%
Specialized Degree (e.g. MD, DDS)	119	0.68%

Source: VEC, Candidate Source: Individuals with active resumes in the workforce system, 4/14/15

Education Level of Available Candidates
 The graph below shows the education levels of potential candidates in Powhatan County, Virginia on April 14, 2015.

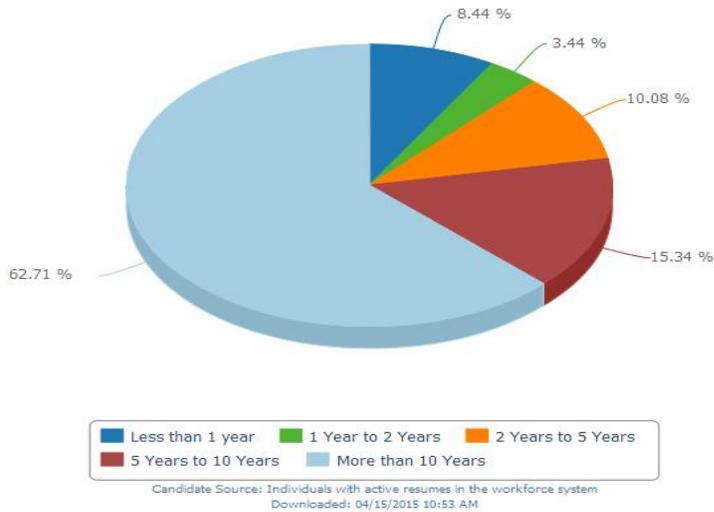


5.5.2 Experience Level

The table below shows the experience levels of potential candidates in Powhatan County, Virginia on April 14, 2015.

Experience	Potential Candidates	Percentage
Less than 1 year	1,470	8.4%
1 Year to 2 Years	598	3.4%
2 Years to 5 Years	1,754	10.1%
5 Years to 10 Years	2,670	15.3%
More than 10 Years	10,916	62.7%

Work Experience Levels of Available Candidates
 The graph below shows the experience levels of potential candidates in Powhatan County, Virginia on April 14, 2015.



5.6 ADDITIONAL LABOR FORCE STATISTICS

Potential Candidates in Workforce System looking for work in Powhatan County: 17,408

Source: VEC, Candidate Source: Individuals with active resumes in the workforce system, 4/14/15

The table below shows the estimated number of unemployed to number of advertised online job openings in Powhatan County, Virginia. These figures are not seasonally adjusted.

Time Period	Number Unemployed	Job Openings	Number of Unemployed per Job Opening
January, 2014	685	200	3.43
February, 2014	677	206	3.29
March, 2014	678	265	2.56
April, 2014	593	267	2.22
May, 2014	723	236	3.06
June, 2014	703	264	2.66
July, 2014	706	390	1.81
August, 2014	720	326	2.21
September, 2014	685	284	2.41
October, 2014	650	212	3.07
November, 2014	599	214	2.8
December, 2014	576	165	3.49
January, 2015	598	176	3.4

Source: Virginia Employment Commission, Local Area Unemployment Statistics; Job Online advertised jobs data, February 2015

5.7 COMMUTING

5.7.1 Commuting Patterns and Times (2013)

	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Workers 16 years and over	12,250	32,631	32,878	11,714	9,460	17,360	12,031	6,404	14,299	8,120	3,336
Place of Work											
Worked in state of residence	98.3%	98.9%	94.6%	99.5%	98.4%	99.3%	89.9%	97.9%	96.4%	97.8%	99.8%
Worked in county of residence	28.4%	25.6%	40.8%	27.4%	29.5%	33.2%	72.6%	39.4%	36.2%	33.3%	24.7%
Worked outside county of residence	69.9%	73.4%	53.8%	72.1%	69.0%	66.2%	17.3%	58.5%	60.3%	64.5%	75.0%
Worked outside state of residence	1.7%	1.1%	5.4%	0.5%	1.6%	0.7%	10.1%	2.1%	3.6%	2.2%	0.2%
Travel Time to Work											
Less than 15 minutes	13.6%	19.8%	19.1%	9.5%	14.3%	20.9%	36.7%	16.9%	19.4%	24.9%	11.0%
15 to 24 minutes	18.9%	30.7%	16.7%	21.9%	24.3%	21.8%	22.4%	19.9%	20.1%	25.8%	18.1%
25 to 34 minutes	25.4%	24.2%	15.1%	32.5%	28.8%	26.2%	16.5%	23.4%	16.3%	13.8%	27.3%
35 to 44 minutes	13.9%	9.4%	8.9%	13.8%	10.5%	10.4%	6.7%	13.8%	6.9%	8.1%	17.0%
45 to 59 minutes	19.5%	9.9%	13.3%	11.5%	15.2%	13.9%	7.3%	14.0%	14.2%	10.8%	15.1%
60 or more minutes	8.7%	6.1%	26.9%	10.9%	6.9%	6.7%	10.3%	12.0%	23.0%	16.5%	11.4%
Mean travel time to work (minutes)	32.4	27.6	39.2	33.5	30.1	28.6	26.4	33.2	39.9	31.3	35.9
Worked at home	5.5%	4.0%	6.5%	9.3%	7.2%	3.1%	4.7%	6.3%	4.1%	4.3%	5.1%

Source: US Census Bureau, American Community Survey, 5 Year Estimates (2009-2013) (Includes only domestic commuting for workers over 16 years old.)

5.7.2 Commute Destination

Top 10 Places Powhatan Residents are Commuting To		Top 10 Places Residents are Commuting From into Powhatan	
Area	Workers	Area	Workers
Chesterfield County	3,068	Chesterfield County	1,041
Henrico County	2,248	Henrico County	367
Richmond City	1,785	Richmond City	216
Fairfax County	1,157	Cumberland County	210
Virginia Beach City	491	Amelia County	177
Goochland County	482	Hanover County	97
Hanover County	427	Goochland County	92
Norfolk City	342	Middlesex County	49
Chesapeake City	292	Hampton City	34
Prince William County	275	Nottoway County	34

Source: VEC, U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics, 2011

5.8 TOP EMPLOYERS, POWHATAN COUNTY

Rank	Employer	NAICS Code	Industry	Ownership	Employment / # of Companies in Sector
NAICS 21 Mining, quarrying, and oil and gas extraction					1
*	Luck Stone	212	Quarry	Private	20 to 49 employees
NAICS 23 Construction					11
50	Wilton Construction Services I	236	Construction of Buildings	Private	20 to 49 employees
9	Colony Construction	237	Heavy and Civil Engineering Construction	Private	100 to 249 employees
27	O C S of VA Inc	237		Private	20 to 49 employees
36	R R Dawson Bridge Co	237		Private	20 to 49 employees
14	Layman & Son Enterprises LLC	238	Specialty Trade Contractors	Private	50 to 99 employees
18	Mid Atlantic Steel Erecto Inc	238		Private	50 to 99 employees
25	M.P. Barden & Sons, Inc.	238		Private	20 to 49 employees
26	Collier Companies	238		Private	20 to 49 employees
38	2150 Management Co.	238		Private	20 to 49 employees
41	Trinity Steel Erection Inc	238		Private	20 to 49 employees
44	Tdu Concrete Inc	238	Private	20 to 49 employees	
NAICS 31-33 Manufacturing					2
12	Moslow Wood Products	321	Wood Product Manufacturing	Private	50 to 99 employees
30	Weightpack Incorporated	333	Machinery Manufacturing	Private	20 to 49 employees
NAICS 42 Wholesale trade					2
11	Anderson Merchandisers, LLC	424	Merchant Wholesalers, Nondurable Goods	Private	50 to 99 employees
	Ellis M. Palmore Lumber Inc.*	425	Lumber and Wood Chips	Private	20 to 49 employees
NAICS 44-45 Retail trade					5
40	R.C. Goodwyn and Sons, Inc.	444	Building Material and Garden Equipment and Supplies Dealers	Private	20 to 49 employees
10	Food Lion	445	Food and Beverage Stores	Private	100 to 249 employees

Rank	Employer	NAICS Code	Industry	Ownership	Employment / # of Companies in Sector
NAICS 44-45 Retail trade					5
21	Gregg Management Company	446	Health and Personal Care Stores	Private	20 to 49 employees
49	Sheetz	447	Gasoline Stations	Private	20 to 49 employees
7	Wal Mart	452	General Merchandise Stores	Private	100 to 249 employees
NAICS 48-49 Transportation and warehousing					3
32	R.S. Thomas Hauling	484	Truck Transportation	Private	20 to 49 employees
46	Fridley Brothers Inc.	484	Truck Transportation	Private	20 to 49 employees
31	Postal Service	491	Postal Service	Federal Government	20 to 49 employees
NAICS 52 Finance and Insurance**					1
1	Anthem**	524	Insurance Carriers and Related Activities	Private	1000 and over employees
NAICS 54 Professional and technical services					3
20	Piotech Inc	541	Professional, Scientific, and Technical Services	Private	50 to 99 employees
23	Computer Upgrade Kings	541		Private	20 to 49 employees
48	Sanair Technologies Laboratory	541		Private	20 to 49 employees
NAICS 61 Educational services					2
2	Powhatan County School Board	611	Educational Services	Local Government	500 to 999 employees
13	Catholic Diocese of Richmond	611		Private	50 to 99 employees
NAICS 62 Health care and social assistance					3
28	Family Practice Specialists of Richmond Inc	621	Ambulatory Health Care Services	Private	20 to 49 employees
34	Donald R Murry Jr DDS PC	621		Private	20 to 49 employees
47	Kidzalat LLC	624	Social Assistance	Private	20 to 49 employees
NAICS 71 Arts, entertainment, and recreation					4
15	Kemper Sports Management Inc	713	Amusement, Gambling, and Recreation Industries	Private	50 to 99 employees
19	Independence Golf Club	713		Private	50 to 99 employees

Rank	Employer	NAICS Code	Industry	Ownership	Employment / # of Companies in Sector
NAICS 71 Arts, entertainment, and recreation					4
29	Foundry at Fine Creek Corp. (L. Daul)	713		Private	20 to 49 employees
42	Westham Golf Management	713		Private	20 to 49 employees
NAICS 72 Accommodation and food services					8
22	McDonald's	722	Food Services and Drinking Places	Private	20 to 49 employees
24	KFC/Taco Bell	722		Private	20 to 49 employees
33	County Seat Restaurant	722		Private	20 to 49 employees
35	Mediterraneo Ristorante LLC	722		Private	20 to 49 employees
37	Starboard Group Employment	722		Private	20 to 49 employees
39	Degollado LLC	722		Private	20 to 49 employees
43	Bella Flora, Inc.	722		Private	20 to 49 employees
45	Wild Ginger	722		Private	20 to 49 employees
NAICS 81 Other services, except public administration					1
17	YMCA	813	Religious, Grantmaking, Civic, Professional, and Similar Organizations	Private	50 to 99 employees
NAICS 92 Public Administration					6
6	County of Powhatan	921	Executive, Legislative, and Other General Government Support	Local Government	100 to 249 employees
16	County of Henrico	921		Local Government	50 to 99 employees
3	Virginia Department of Juvenile Justice	922	Justice, Public Order, and Safety Activities	State Government	250 to 499 employees
4	Powhatan Correctional Center	922		State Government	250 to 499 employees
5	Deep Meadow Correctional Center	922		State Government	250 to 499 employees
8	Commonwealth of Virginia, Powhatan Reception Class	922		State Government	100 to 249 employees

Source: Virginia Employment Commission, 2nd Quarter 2014, Quarterly Census of Employment and Wages (QCEW)

*Company added to list because it was included in the Major Employer section of the VEDP Community Profile

** Anthem is erroneously included in Powhatan's list of top employers. Company does not operate in the County and needs to be removed. Revised VED data not available yet.

6 TAXES

6.1 REAL ESTATE TAXES

<i>(FY 2015 unless noted otherwise)</i>	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Nominal Tax Rate per \$100 of assessed valuation	\$0.90	\$0.52	\$0.99	\$0.88	\$0.53	\$0.85	\$0.40	\$0.72	\$0.80	\$0.77	\$0.72
Assessment ratio (% of fair market value taxable)*	100%	100%	93.8%	98.2%	96.6%	100.0%	98.3%	100.0%	100%	100%	100%
Effective Tax Rate	\$0.90	\$0.52	\$0.93	\$0.86	\$0.51	\$0.85	\$0.39	\$0.72	\$0.80	\$0.77	\$0.72

*Virginia statutes require reassessments to be made at 100 percent of fair market value. However, because of rising real estate values and most localities reassessing only periodically, actual assessment ratios are usually lower than 100 percent. Each year, the Virginia Department of Taxation examines real estate transactions, comparing real estate assessments effective on the date of the property's sale with the selling price of the property. The Tax Department's ratios of assessed values to selling prices for 2014 are shown in this table. They represent the best measures of actual assessment ratios in Virginia localities. (Source: VEDP Guide to Local Taxes)

¹ Tracts of land in excess of 5 acres devoted to agriculture or horticulture and timberland of 20 acres or more may be eligible for some deferred tax.

² Tuckahoe Creek Service District: \$0.32 (ad valorem tax)

Source: Community websites, Virginia Economic Development Partnership (Assessment Ratio)

6.2 MACHINERY & TOOLS TAX

<i>(FY 2015 unless noted otherwise)</i>	Powhatan County	Bedford County	Fauquier County	Fluvanna County*	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County*	Orange County* (CY 2014)	Southampton County	Charles City County*											
Nominal Tax Rate (per \$100 of assessed valuation)	\$3.60	\$1.20	\$2.30	\$2.00	\$1.00	\$0.70	\$0.66	\$1.25	\$1.831	\$2.40	\$3.00											
Value used for tax purpose	Original Cost	Original Cost	Original Cost	Original Cost	Original Cost	Original Cost	Original Cost	Original Cost	Original Cost	Original Cost	Original Cost											
Assessment ratio (in years)																						
1	60%	\$2.16	85%	\$1.02	70%	\$1.61	13%	\$0.26	75%	\$0.75	100%	\$0.70	80%	\$0.53	40%	\$0.50	75%	\$1.37	80%	\$1.92	50%	\$1.50
2	45%	\$1.62	80%	\$0.96	60%	\$1.38	13%	\$0.26	75%	\$0.75	100%	\$0.70	80%	\$0.53	40%	\$0.50	70%	\$1.28	70%	\$1.68	40%	\$1.20
3	37.5%	\$1.35	75%	\$0.90	50%	\$1.15	13%	\$0.26	75%	\$0.75	100%	\$0.70	80%	\$0.53	40%	\$0.50	65%	\$1.19	60%	\$1.44	30%	\$0.90
4	30%	\$1.08	70%	\$0.84	40%	\$0.92	13%	\$0.26	75%	\$0.75	100%	\$0.70	80%	\$0.53	40%	\$0.50	60%	\$1.10	50%	\$1.20	20%	\$0.60
5	20%	\$0.72	65%	\$0.78	30%	\$0.69	13%	\$0.26	75%	\$0.75	100%	\$0.70	80%	\$0.53	40%	\$0.50	55%	\$1.01	40%	\$0.96	10%	\$0.30
6	20%	\$0.72	60%	\$0.72	20%	\$0.46	13%	\$0.26	56%	\$0.56	100%	\$0.70	80%	\$0.53	30%	\$0.38	50%	\$0.92	30%	\$0.72	10%	\$0.30
7	20%	\$0.72	55%	\$0.66	10%	\$0.23	13%	\$0.26	56%	\$0.56	100%	\$0.70	80%	\$0.53	30%	\$0.38	45%	\$0.82	20%	\$0.48	10%	\$0.30
8	20%	\$0.72	45%	\$0.54	10%	\$0.23	13%	\$0.26	56%	\$0.56	100%	\$0.70	80%	\$0.53	30%	\$0.38	40%	\$0.73	10%	\$0.24	10%	\$0.30
9	20%	\$0.72	35%	\$0.42	10%	\$0.23	13%	\$0.26	56%	\$0.56	100%	\$0.70	80%	\$0.53	30%	\$0.38	35%	\$0.64	10%	\$0.24	10%	\$0.30
10	20%	\$0.72	25%	\$0.30	10%	\$0.23	13%	\$0.26	56%	\$0.56	100%	\$0.70	80%	\$0.53	30%	\$0.38	30%	\$0.55	10%	\$0.24	10%	\$0.30
11	20%	\$0.72	25%	\$0.30	10%	\$0.23			37%	\$0.37	100%	\$0.70	80%	\$0.53	20%	\$0.25	25%	\$0.46	10%	\$0.24	10%	\$0.30
12	20%	\$0.72	25%	\$0.30	10%	\$0.23			37%	\$0.37	100%	\$0.70	80%	\$0.53	20%	\$0.25	25%	\$0.46	10%	\$0.24	10%	\$0.30
13	20%	\$0.72	25%	\$0.30	10%	\$0.23			37%	\$0.37	100%	\$0.70	80%	\$0.53	20%	\$0.25	25%	\$0.46	10%	\$0.24	10%	\$0.30
14	20%	\$0.72	25%	\$0.30	10%	\$0.23			37%	\$0.37	100%	\$0.70	80%	\$0.53	20%	\$0.25	25%	\$0.46	10%	\$0.24	10%	\$0.30
15	20%	\$0.72	25%	\$0.30	10%	\$0.23			37%	\$0.37	100%	\$0.70	80%	\$0.53	20%	\$0.25	25%	\$0.46	10%	\$0.24	10%	\$0.30
16+	20%	\$0.72	25%	\$0.30	10%	\$0.23			37%	\$0.37	100%	\$0.70	80%	\$0.53	10%	\$0.13	25%	\$0.46	10%	\$0.24	10%	\$0.30

Source: Community websites // * Assessment Schedule source: VEDP

6.3 BUSINESS TANGIBLE PERSONAL PROPERTY TAX

<i>(FY 2015 unless noted otherwise)</i>	Powhatan County		Bedford County**		Fauquier County**		Fluvanna County*		Goochland County		Isle of Wight County	
Nominal Tax Rate (per \$100 of assessed valuation)	\$3.60		\$1.70		\$2.30		\$4.15		\$4.00		\$4.50	
Value used for tax purpose	Original Cost		Original Cost		Original Cost		Original Cost		Original Cost		Original Cost	
Assessment ratio (in years)												
1	60%	\$2.16	100%	\$1.70	70%	\$1.61	20%	\$0.83	60%	\$2.40	40%	\$1.80
2	45%	\$1.62	95%	\$1.62	60%	\$1.38	20%	\$0.83	45%	\$1.80	40%	\$1.80
3	37.5%	\$1.35	90%	\$1.53	50%	\$1.15	20%	\$0.83	37.50%	\$1.50	40%	\$1.80
4	30%	\$1.08	85%	\$1.45	40%	\$0.92	20%	\$0.83	30%	\$1.20	40%	\$1.80
5	20%	\$0.72	80%	\$1.36	30%	\$0.69	20%	\$0.83	20%	\$0.80	40%	\$1.80
6	20%	\$0.72	75%	\$1.28	20%	\$0.46	20%	\$0.83	20%	\$0.80	40%	\$1.80
7	20%	\$0.72	70%	\$1.19	10%	\$0.23	20%	\$0.83	20%	\$0.80	40%	\$1.80
8	20%	\$0.72	65%	\$1.11	10%	\$0.23	20%	\$0.83	20%	\$0.80	40%	\$1.80
9	20%	\$0.72	60%	\$1.02	10%	\$0.23	20%	\$0.83	20%	\$0.80	40%	\$1.80
10	20%	\$0.72	55%	\$0.94	10%	\$0.23	20%	\$0.83	20%	\$0.80	40%	\$1.80
11	20%	\$0.72	50%	\$0.85	10%	\$0.23			20%	\$0.80	40%	\$1.80
12	20%	\$0.72	45%	\$0.77	10%	\$0.23			20%	\$0.80	40%	\$1.80
13	20%	\$0.72	40%	\$0.68	10%	\$0.23			20%	\$0.80	40%	\$1.80
14	20%	\$0.72	35%	\$0.60	10%	\$0.23			20%	\$0.80	40%	\$1.80
15	20%	\$0.72	30%	\$0.51	10%	\$0.23			20%	\$0.80	40%	\$1.80
16	20%	\$0.72	25%	\$0.43	10%	\$0.23			20%	\$0.80	40%	\$1.80

Source: Community websites, *Assessment Schedule source: VEDP

** Some communities have different assessment schedules or rates for computer equipment, including: Bedford (85%, 75%, 65%, 55%, 45%, 35%, 25%); Fauquier County (60%, 40%, 20%, 10%), and Mecklenburg County (80%, 50%, 40%, 20%, 10%, 5%)

6.3 Business Tangible Personal Property Tax cont.

<i>(FY 2015 unless noted otherwise)</i>	Mecklenburg County**		Nelson County*		Orange County* (CY 2014)		Southampton County*		Charles City County*	
Nominal Tax Rate (per \$100 of assessed valuation)	\$3.26		\$3.45		\$2.20		\$5.00		\$3.75	
Value used for tax purpose	Original Cost		Original Cost		Original Cost		Original Cost		Original Cost	
Assessment ratio (in years)										
1	80%	\$2.61	15%	\$0.52	65%	\$1.43	80%	\$4.00	60%	\$2.25
2	60%	\$1.96	15%	\$0.52	60%	\$1.32	70%	\$3.50	50%	\$1.88
3	50%	\$1.63	15%	\$0.52	55%	\$1.21	60%	\$3.00	40%	\$1.50
4	40%	\$1.30	15%	\$0.52	50%	\$1.10	50%	\$2.50	30%	\$1.13
5	30%	\$0.98	15%	\$0.52	45%	\$0.99	40%	\$2.00	20%	\$0.75
6	20%	\$0.65	15%	\$0.52	40%	\$0.88	30%	\$1.50	10%	\$0.38
7	15%	\$0.49	15%	\$0.52	37%	\$0.81	20%	\$1.00	10%	\$0.38
8	15%	\$0.49	15%	\$0.52	34%	\$0.75	10%	\$0.50	10%	\$0.38
9	15%	\$0.49	15%	\$0.52	31%	\$0.68	10%	\$0.50	10%	\$0.38
10	15%	\$0.49	15%	\$0.52	28%	\$0.62	10%	\$0.50	10%	\$0.38
11	15%	\$0.49	15%	\$0.52	25%	\$0.55	10%	\$0.50	10%	\$0.38
12	15%	\$0.49	15%	\$0.52	25%	\$0.55	10%	\$0.50	10%	\$0.38
13	15%	\$0.49	15%	\$0.52	25%	\$0.55	10%	\$0.50	10%	\$0.38
14	15%	\$0.49	15%	\$0.52	25%	\$0.55	10%	\$0.50	10%	\$0.38
15	15%	\$0.49	15%	\$0.52	25%	\$0.55	10%	\$0.50	10%	\$0.38
16	15%	\$0.49	15%	\$0.52	25%	\$0.55	10%	\$0.50	10%	\$0.38

Source: Community websites, *Assessment Schedule source: VEDP

** Some communities have different assessment schedules or rates for computer equipment, including: Bedford (85%, 75%, 65%, 55%, 45%, 35%, 25%); Fauquier County (60%, 40%, 20%, 10%), and Mecklenburg County (80%, 50%, 40%, 20%, 10%, 5%)

6.4 MERCHANT’S CAPITAL TAX

<i>(FY 2015 unless noted otherwise)</i>	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Nominal Tax Rate (per \$100 of assessed valuation)	n/a	Eliminated in 2011**	n/a	n/a	n/a	n/a	\$0.72	n/a	\$0.40	\$0.50	\$3.00
Value used for tax purpose							Original Cost		Original Cost	Original Cost	Fair Market Value
Assessment ratio							100%		100%	100%	100%

Source: Community websites

6.5 BUSINESS LICENSE TAX

<i>Per \$100 of gross receipts (FY 2015 unless noted otherwise)</i>	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Retailers	No tax; annual fee varying by business types	no tax; only annual \$30 fee	\$0.10	n/a	\$0.05	\$0.12	n/a	No tax; \$30 annual flat fee	n/a	n/a	n/a
Wholesalers and Distributors			\$0.0425 per \$100 of gross purchases		\$0.025 per \$100 of gross purchases	\$0.05 per \$100 of gross purchases					
Business Services			\$0.19		\$0.10	\$0.20					
Financial Services			\$0.30		\$0.15	\$0.35					
Mail Order Firms			no rate provided		\$0.05	no rate provided					
Contractors			\$0.09		\$0.10	\$0.10					

Source: Community websites

6.6 POWHATAN COUNTY BUSINESS LICENSE FEES (FY'14)

Powhatan Business License Fees
Business License Penalty \$10.00
Personal Services \$50.00
Professional Services \$50.00
Contractors \$50.00
Lodging & Dining \$50.00
Retail Merchants \$50.00
Wholesale \$50.00
Limitation on Direct Seller \$50.00
Short Term Rental of Gross \$50.00

Source: Powhatan County 2015 Adopted Budget Book

6.7 LODGING AND MEALS TAXES

<i>(FY 2015 unless noted otherwise)</i>	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Lodging Tax	n/a	5%	2%	n/a	n/a	2%	5%	5%	2%	2%	n/a
Meals Tax (Food & Beverage)	n/a	4%	n/a	n/a	n/a	4%	n/a	4%	4%	4%	n/a

Source: Community websites, Virginia Tourism Corporation

* Towns in some communities also have these taxes i.e. Smithfield in Isle of Wight, South Hill in Mecklenburg, Orange in Orange County, have meals and lodging taxes.

6.8 SALES AND USE TAX

	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
State Sales Tax	4.3%	4.3%	4.3%	4.3%	4.3%	5.0%	4.3%	4.3%	4.3%	5.0%	4.3%

Source: Virginia Department of Taxation

7 REVENUES

7.1 TOTAL REVENUES BY LOCALITY (FY'14)

Locality	Local Revenue			From the Commonwealth			Federal Pass-Through			Direct Federal Aid			Total Revenue
	Amount	Per Capita	% of Revenue	Amount	Per Capita	% of Revenue	Amount	Per Capita	% of Revenue	Amount	Per Capita	% of Revenue	
Powhatan	\$43,232,929	\$1,520	58.21	\$28,095,020	\$987	37.83	\$2,944,618	\$103	3.96	\$0	\$0	-	\$74,272,567
Bedford	\$79,562,175	\$1,043	48.25	\$73,494,932	\$963	44.57	\$10,745,818	\$141	6.52	\$1,092,770	\$14	0.66	\$164,895,695
Fauquier	\$155,158,078	\$2,331	64.26	\$76,441,348	\$1,148	31.66	\$8,298,072	\$125	3.44	\$1,547,696	\$23	0.64	\$241,445,194
Fluvanna	\$35,302,325	\$1,357	53.84	\$27,101,767	\$1,042	41.33	\$3,154,629	\$121	4.81	\$10,380	\$0	0.02	\$65,569,101
Goochland	\$41,231,382	\$1,927	70.26	\$14,668,121	\$685	25.00	\$2,781,399	\$130	4.74	\$0	\$0	-	\$58,680,902
Isle of Wight	\$58,951,530	\$1,617	56.85	\$39,335,143	\$1,079	37.93	\$5,239,754	\$144	5.05	\$170,200	\$5	0.16	\$103,696,627
Mecklenburg	\$45,622,731	\$1,427	50.39	\$38,602,240	\$1,207	42.63	\$6,114,903	\$191	6.75	\$205,830	\$6	0.23	\$90,545,704
Nelson	\$29,674,121	\$1,974	65.06	\$13,409,396	\$892	29.40	\$2,459,261	\$164	5.39	\$70,435	\$5	0.15	\$45,613,213
Orange	\$49,170,019	\$1,440	53.99	\$35,935,620	\$1,053	39.46	\$4,646,106	\$136	5.10	\$1,322,029	\$39	1.45	\$91,073,774
Southampton	\$25,335,566	\$1,342	46.41	\$25,672,769	\$1,360	47.03	\$3,577,216	\$190	6.55	\$0	\$0	-	\$54,585,551
Charles City	\$11,870,086	\$1,633	58.88	\$6,806,612	\$937	33.76	\$1,413,885	\$195	7.01	\$70,544	\$10	0.35	\$20,161,127

Source: Auditor of Public Account, Commonwealth of Virginia

7.2 LOCAL REVENUES FY 2014

	Powhatan	Bedford	Fauquier	Fluvanna	Goochland	Isle of Wight	Mecklenburg	Nelson	Orange	Southampton	Charles City
General Property Taxes Total	\$34,940,715	\$56,805,485	\$123,264,028	\$28,588,876	\$31,119,082	\$43,628,917	\$32,243,352	\$21,894,598	\$37,472,646	\$16,612,263	\$7,991,025
<i>Per Capita</i>	\$1,228	\$744	\$1,852	\$1,099	\$1,454	\$1,197	\$1,008	\$1,457	\$1,098	\$880	\$1,099
<i>% of Revenue</i>	80.82	71.40	79.44	80.98	75.47	74.01	70.67	73.78	76.21	65.57	67.32
Real Property	\$27,316,862	\$41,012,909	\$98,768,956	\$19,154,159	\$21,257,950	\$29,571,776	\$14,372,766	\$17,679,424	\$27,802,213	\$10,173,887	\$5,598,043
Public Service Corporations	\$803,610	\$1,336,052	\$6,031,072	\$4,259,048	\$635,563	\$1,069,920	\$1,192,806	\$646,946	\$1,175,665	\$1,071,217	\$647,072
Personal Property: General	\$5,883,910	\$11,159,927	\$16,863,850	\$4,825,586	\$8,366,842	\$8,747,520	\$15,224,191	\$3,153,367	\$7,300,940	\$3,854,419	\$1,461,712
Personal Property: Mobile Home	\$6,573	\$132,498	\$0	\$14,788	\$4,515	\$132,753	\$70,077	\$29,069	\$30,842	\$51,683	\$8,071
Machinery & Tools	\$356,379	\$2,422,814	\$313,241	\$14,195	\$348,029	\$3,603,109	\$585,493	\$10,891	\$554,740	\$886,993	\$84,358
Merchant's Capital	\$0	\$429	\$0	\$0	\$0	\$0	\$391,506	\$0	\$153,031	\$158,681	\$28,770
Penalties	\$323,736	\$458,729	\$837,710	\$239,357	\$291,410	\$334,094	\$252,484	\$196,788	\$303,406	\$264,184	\$93,809
Interest	\$249,645	\$282,127	\$449,199	\$81,743	\$214,773	\$169,745	\$154,029	\$178,113	\$151,809	\$151,199	\$69,190
Other Local Taxes Total	\$4,250,661	\$9,016,910	\$14,327,266	\$2,957,767	\$6,479,035	\$5,374,407	\$4,578,882	\$4,022,028	\$5,074,457	\$2,019,368	\$1,178,872
<i>Per Capita</i>	\$149	\$118	\$215	\$114	\$303	\$147	\$143	\$268	\$149	\$107	\$162
<i>% of Revenue</i>	9.83	11.33	9.23	8.38	15.71	9.12	10.04	13.55	10.32	7.97	9.93
<i>% of Average</i>	48.16	38.09	69.38	36.65	97.60	47.52	46.16	86.26	47.91	34.49	52.29
Local Sales and Use Taxes	\$1,953,664	\$4,796,875	\$7,558,981	\$1,403,062	\$2,495,443	\$2,049,667	\$2,946,661	\$1,059,452	\$2,249,569	\$548,427	\$929,502
Consumer Utility Taxes	\$699,279	\$1,323,863	\$1,650,054	\$541,027	\$390,637	\$885,039	\$468,829	\$469,621	\$663,348	\$509,364	\$138,572
Business License Taxes	\$102,179	\$0	\$1,436,850	\$0	\$668,023	\$443,454	\$1,850	\$31,140	\$0	\$217,011	\$0
Franchise License Taxes	\$167,166	\$0	\$0	\$0	\$0	\$8,047	\$20,189	\$103,074	\$24,219	\$0	\$5,875
Motor Vehicle License Taxes	\$985,351	\$0	\$1,826,612	\$715,553	\$796,099	\$918,844	\$617,819	\$692,264	\$960,387	\$399,582	\$87
Bank Stock Taxes	\$0	\$262,252	\$115,785	\$52,939	\$1,603,482	\$8,836	\$3,919	\$76,659	\$61,718	\$2,561	\$0
Recordation and Will Taxes	\$337,493	\$865,921	\$1,656,673	\$245,186	\$426,458	\$128,804	\$231,859	\$292,634	\$373,263	\$109,470	\$56,319
Hotel and Motel Room Taxes	\$0	\$404,192	\$82,311	\$0	\$1,085	\$21,936	\$35,253	\$417,453	\$28,828	\$11,253	\$0
Restaurant Food Taxes	\$0	\$1,363,807	\$0	\$0	\$0	\$330,925	\$0	\$879,731	\$713,125	\$158,835	\$0
Other Local Taxes	\$5,529	\$0	\$0	\$0	\$97,808	\$578,855	\$252,503	\$0	\$0	\$62,865	\$48,517

Source: Auditor of Public Account, Commonwealth of Virginia

7.3 REVENUES GENERATED FROM PROPERTIES

7.3.1 Real Estate

7.3.1.1 Real Estate: Powhatan County

Real Estate Values	FY'13		FY'14		FY '15 Estimate	
	Real Estate Values	%	Real Estate Values	%	Real Estate Values	%
Total Taxable Value	\$3,010,999,300	100%	\$3,040,216,425	100%	\$2,982,996,150	100%
Residential	\$2,553,418,100	84.8%	\$2,583,852,700	85.0%	\$2,523,031,700	84.6%
Commercial/Industrial	\$198,695,300	6.6%	\$205,956,200	6.8%	\$211,145,600	7.1%
Agricultural Final	\$258,885,900	8.6%	\$250,407,525	8.2%	\$248,818,850	8.3%
Agricultural w/land use	\$580,240,600		\$571,239,000		\$559,484,400	
Land Use	(\$321,354,700)	55.4% of total Agriculture	(\$320,831,475)	56.2% of total agriculture	(\$310,665,550)	56% of total agriculture
Real Estate Taxes	FY'13		FY'14		FY '15 Estimate	% Change
Total RE Taxes	\$27,098,994		\$27,361,948		\$27,463,100	
PSC	n/a		\$803,610	*CAFR	\$801,000	
RE from Classes			\$26,558,338		\$26,662,100	
RE taxes from Residential			\$22,571,693		\$22,550,925	-0.1%
RE taxes from Comm/Ind			\$1,799,166		\$1,887,225	4.9%
RE taxes from Ag			\$2,187,478		\$2,223,950	1.7%

Source: Powhatan County

7.3.1.2 Real Estate: Nelson County

Real Estate Values	Actual FY'13		Actual FY'14		FY'15 Estimate	
	Real Estate Values	%	Real Estate Values	%	Real Estate Values	%
Total Taxable Value	\$3,862,601,100	100%	\$3,177,903,000	100%	\$3,192,213,600	100%
Residential	\$2,414,479,400	62.5%	\$1,907,839,400	60.0%	1,920,825,600	60.2%
Commercial/Industrial	\$93,352,200	2.4%	\$124,080,900	3.9%	\$126,752,700	4.0%
Agricultural	\$1,139,165,200	29.5%	\$939,249,800	29.6%	\$938,200,000	29.4%
Exempt	\$215,604,300	5.6%	\$206,732,900	6.5%	\$206,435,300	6.5%
Real Estate Taxes	FY'13		FY'14		FY '15 Estimate	% Change
Total RE Taxes	\$17,632,961		\$17,474,814		\$17,166,152	
Real and Personal PSC	\$662,087		\$646,946		\$528,790	
RE from Classes	\$16,970,874		\$16,827,868		\$16,637,362	
RE from Residential	\$10,608,350		\$10,102,533		\$10,011,069	-0.9%
RE taxes from Comm/Ind	\$410,156		\$657,042		\$660,617	0.5%
RE taxes from Agric.	\$5,005,080		\$4,973,585		\$4,889,765	-1.7%

Source: Nelson County

7.3.1.3 Real Estate Goochland County

Real Estate Values	FY'13	Actual FY'14 (2013 Land Book)		FY'15 (2014 Land Book)	
		Real Estate Values	%	Real Estate Values	%
Total Taxable Value	n/a	\$4,054,090,042	100.0%	\$4,207,913,780	100.0%
Residential		\$2,823,196,691	69.6%	\$2,936,082,232	69.8%
Commercial/Industrial		\$768,529,076	19.0%	\$806,236,695	19.2%
Agricultural		\$462,364,275	11.4%	\$465,594,853	11.1%
Real Estate Taxes	FY'13	Actual FY'14		FY'15	% Change
Total RE Taxes	\$20,794,445	\$22,196,154		n/a	
<i>Less PSC etc.</i>	<i>Data not provided by County</i>				
RE from Classes	n/a	\$21,486,677		\$22,301,943	
RE from Residential		\$14,962,942		\$15,561,236	4.0%
RE taxes from Comm/Ind		\$4,073,204		\$4,273,054	4.9%
RE taxes from Ag		\$2,450,531		\$2,467,653	0.7%

Source: Goochland County

7.3.1.4 Real Estate Isle of Wight County

Real Estate Values	Actual FY '14	
	Real Estate Values	%
Total Taxable Value*	\$4,147,194,000	100%
Residential	3,239,296,300	78.1%
Commercial/Industrial	665,825,700	16.1%
Agricultural	\$242,072,000	5.8%

**Does not reflect land use assessment //*

Source: Isle of Wight County FY'14 CAFR

7.3.1.5

Real Estate Values	Actual FY '14	
	Real Estate Values	%
Total Taxable Value	\$3,679,856,200	100%
Residential	\$2,851,679,600	77.5%
Commercial/Industrial	\$285,469,200	7.8%
Agricultural Final	\$542,707,400	14.7%
Agricultural w/ Land Use	\$935,478,300	
Land Use Deferment	-\$392,770,900	

Source: Orange County CAFR FY'14

7.3.1.6 Real Estate Orange County

Real Estate Values	Actual FY '14	
	Real Estate Values	%
Total Taxable Value	\$3,679,856,200	100%
Residential	\$2,851,679,600	77.5%
Commercial/Industrial	\$285,469,200	7.8%
Agricultural Final	\$542,707,400	14.7%
Agricultural w/ Land Use	\$935,478,300	
Land Use Deferment	-\$392,770,900	

Source: Orange County CAFR FY'14

7.3.2 Machinery & Tools

Powhatan		Assessed Value	% Change	Total Taxes	% Change
	Actual FY'13	\$9,885,765	5.9%	\$345,901	2.9%
	Actual FY'14	\$10,543,520	6.7%	\$379,566	9.7%
	Estimate FY'15	\$9,428,908	-10.6%	\$339,440	-4.8%

Source: Powhatan County

Goochland		Assessed Value	% Change	Total Taxes	% Change
	Actual FY'12	\$9,708,425		\$363,345	
	Actual FY'13	\$9,074,954	-6.5%	\$343,446	-5.5%
	Actual FY'14	\$9,286,565	2.3%	\$348,029	1.3%

Source: Goochland County CAFR

Nelson		Assessed Value	% Change	Total Taxes	% Change
	Actual FY'12	\$456,903		\$5,532	
	Actual FY'13	\$674,898	47.7%	\$8,217	48.5%
	Actual FY'14	\$901,110	33.5%	\$10,891	32.5%
	Estimate FY'15			\$8,000	-26.5%

Source: Nelson County

7.3.3 Business Personal Property Tax

Powhatan		Assessed Value	% Change	Total Taxes	% Change
	Actual FY'13	\$17,374,395	16.7%	\$625,478	
	Actual FY'14	\$16,361,858	-5.8%	\$589,026	-5.8%
	Estimate FY'15	\$21,551,840	31.7%	\$775,866	31.7%

Source: Powhatan County

Nelson and Goochland County do not disclose data for Business Personal Property.

7.4 LOCAL SALES AND USE TAX COLLECTION

CY 2014 / FY2014	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City
Annual Tax Revenue - CY 2014	\$2,269,224	\$5,307,421	\$8,649,620	\$1,399,964	\$2,790,312	\$2,545,607	\$2,260,109	\$1,116,541	\$2,884,777	\$622,326	\$801,205
Annual Tax Revenue - FY 2014	\$2,111,487	\$4,958,004	8,081,751	\$1,362,755	\$2,561,803	\$2,422,657	\$3,043,708	\$1,045,908	\$2,712,174	\$597,744	\$911,816
% of Statewide Sales and Use Tax Revenue	0.193%	0.453%	0.738%	0.124%	0.234%	0.221%	0.278%	0.096%	0.248%	0.055%	0.083%
Annual Tax Revenue Estimate - FY 2016	\$2,293,680	\$5,385,813	\$8,779,098	\$1,480,342	\$2,782,852	\$2,631,699	\$3,306,339	\$1,136,156	\$2,946,199	\$649,322	\$990,493

*Source: Weldon Cooper Center for Public Service / Virginia Department of Taxation; Annual totals vary depending upon report used
Months listed in file refer to month of sales, not to month of revenue distribution.*

7.5 TRAVEL ECONOMIC IMPACTS

	Year	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Employment	2013	91	974	1,685	525	228	369	1,303	1,617	557	148	28
	2012	90	1,012	1,702	515	226	370	1,250	1,556	551	144	28
	2011	89	998	1,648	516	225	371	1,239	1,559	544	142	28
Expenditures	2013	\$8,660,594	\$80,971,958	\$156,478,403	\$52,480,284	\$21,754,890	\$36,174,210	\$120,592,010	\$180,160,429	\$43,659,504	\$14,488,077	\$2,784,478
	2012	\$8,586,890	\$84,159,445	\$160,647,033	\$51,418,396	\$21,549,382	\$36,330,757	\$115,666,525	\$173,367,406	\$43,238,447	\$14,162,887	\$2,733,853
	2011	\$8,276,957	\$81,105,679	\$150,916,343	\$50,365,740	\$20,945,938	\$35,545,601	\$112,037,314	\$169,676,803	\$41,683,509	\$13,574,779	\$2,692,821
Local Tax Receipts	2013	\$176,708	\$2,345,729	\$2,597,052	\$691,735	\$431,063	\$809,107	\$3,483,039	\$5,210,440	\$1,267,329	\$274,708	\$79,097
	2012	\$172,689	\$2,403,063	\$2,627,957	\$668,007	\$420,860	\$800,941	\$3,292,811	\$4,941,988	\$1,237,086	\$264,686	\$76,544
	2011	\$168,466	\$2,343,832	\$2,498,588	\$662,233	\$414,014	\$793,094	\$3,228,008	\$4,895,191	\$1,206,999	\$256,759	\$76,305
Payroll	2013	\$1,585,374	\$17,010,325	\$30,099,557	\$10,254,973	\$3,989,949	\$6,961,697	\$23,906,785	\$31,132,713	\$10,243,440	\$2,919,050	\$624,297
	2012	\$1,535,146	\$17,266,758	\$30,230,116	\$9,812,662	\$3,859,893	\$6,828,424	\$22,394,445	\$29,258,697	\$9,907,568	\$2,786,843	\$598,622
	2011	\$1,488,529	\$16,739,087	\$28,791,916	\$9,668,879	\$3,774,095	\$6,720,545	\$21,820,659	\$28,805,974	\$9,608,019	\$2,686,990	\$593,140
State Tax Receipts	2013	\$294,898	\$3,737,048	\$7,198,905	\$2,368,854	\$714,722	\$1,611,684	\$5,450,401	\$7,976,463	\$1,819,271	\$748,278	\$111,845
	2012	\$291,102	\$3,896,824	\$7,417,075	\$2,338,490	\$712,703	\$1,543,165	\$5,252,542	\$7,705,739	\$1,809,538	\$698,783	\$109,815
	2011	\$282,295	\$3,778,180	\$7,010,027	\$2,304,495	\$696,943	\$1,518,963	\$5,118,562	\$7,587,397	\$1,755,033	\$673,825	\$108,822

Source: Virginia Tourism Corporation

Expenditures represent the direct spending by domestic travelers including food, accommodations, auto transportation, public transportation, incidental purchases, entertainment / recreation and travel generated-tax receipts.

Payroll represents the direct wages, salaries and tips corresponding to the direct travel-related employment.

Employment represents the estimates of direct travel-related employment in the locality.

State Tax Receipts represents the estimates of direct travel-related state taxes generated within the locality. These receipts include corporate income taxes, individual income taxes, sales and gross receipts taxes, and excise taxes

Local Travel Receipts represents the estimates of direct travel-related local taxes generated within the locality. These include county and city receipts from individual and corporate income taxes, sales, excise and gross receipts taxes, and property taxes.

7.6 LOCAL EXCISE TAX COLLECTION

	Lodging Tax Rate	Lodging Excise Tax Collected			Meals Tax Rate	Food Service Excise Tax Collected		
		2011	2012	2013		2011	2012	2013
Powhatan County	n/a	\$0	\$0	\$0	n/a	\$0	\$0	\$0
Bedford County	5%	\$325,175	\$375,457	\$381,846	4%	\$1,501,658	\$1,620,177	\$1,640,379
Fauquier County	2%	\$86,905	\$99,075	\$85,240	n/a	\$0	\$0	\$0
Warrenton	4%	\$162,957	\$195,419	\$187,263	4%	\$1,894,111	\$2,062,342	\$2,152,237
Fluvanna County	n/a	\$0	\$0	\$0	n/a	\$0	\$0	\$0
Goochland County	n/a	\$0	\$0	\$0	n/a	\$0	\$0	\$0
Isle of Wight County	2%	\$27,474	\$25,477	\$20,690	4%	\$273,548	\$330,201	\$321,093
Smithfield	5%	\$127,484	\$139,115	\$135,230	6%	\$964,515	\$966,571	\$1,198,415
Mecklenburg County	5%	\$18,813	\$20,549	\$15,302	n/a	\$0	\$0	\$0
South Hill*	5.5%	\$284,234	\$343,289	\$315,965	5.5%	\$1,396,476	\$1,457,804	\$1,521,465
Nelson County	5%	\$408,500	\$400,624	\$433,692	4%	\$666,957	\$732,634	\$827,211
Orange County	2%	\$14,561	\$22,294	\$28,563	4%	\$577,864	\$631,748	\$646,602
Town of Orange	5%	\$96,906	\$112,543	\$133,002	8%	\$940,940	\$1,007,295	\$1,058,059
Southampton County	2%	\$9,060	\$13,455	\$13,673	4%	\$118,248	\$122,483	\$125,016
Charles City County	n/a	\$0	\$0	\$0	n/a	\$0	\$0	\$0

*Other towns in Mecklenburg County have different rates; South Hill is the only town in the community reporting the data

Source: Virginia Tourism Corporation

8 UTILITIES

8.1 PROVIDERS

8.1.1 Electric Providers

Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Southside Electric Cooperative	Southside Electric Cooperative	Northern Virginia Electric Cooperative	Central Virginia Electric Cooperative	Central Virginia Electric Cooperative	City of Franklin	Mecklenburg Electric Cooperative	American Electric Power	Central Virginia Electric Cooperative	Community Electric Cooperative	Central Virginia Electric Cooperative
Dominion Virginia Power	Appalachian Power	Dominion Virginia Power	Dominion Virginia Power	Rappahannock Electric Cooperative	Community Electric Cooperative	Dominion Virginia Power	Central Virginia Electric Cooperative	Rappahannock Electric Cooperative	Dominion Virginia Power	Dominion Virginia Power
	Town of Bedford			Dominion Virginia Power	Dominion Virginia Power			Dominion Virginia Power		

Source: VEDP

8.1.2 Sewer Providers

Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Powhatan County	Bedford Regional Water Authority	Town of Warrenton	Lake Monticello Service Co.	Goochland County	City of Franklin	Town of Chase City	Town of Lovingston	Rapidan Service Authority	City of Franklin / Southampton County	Roxbury Industrial Center
		Fauquier County Water & Sewer Authority	Fluvanna County Public Works	Henrico County	Hampton Roads Sanitation District	Town of Clarksville	Nelson County Water & Sewer Authority	Town of Orange		Charles City County
		Vint Hill Economic Development Authority			City of Franklin/Isle of Wight County	Town of South Hill		Town of Gordonsville		
					Town of Smithfield	Town of South Hill/Town of LaCrosse				
					Isle of Wight County	Town of LaCrosse				
						Town of Boydton				

Source: VEDP

8.1.3 Water Providers

Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Powhatan County	Bedford Regional Water Authority	Town of Warrenton	Fork Union Sanitary District	Goochland County	City of Franklin	Town of Chase City	Lovingston Sanitary District	Rapidan Service Authority	Southampton County	Roxbury Industrial Center
Aqua Virginia		Fauquier County Water & Sewer Authority	Sydnor Hydrodynamics, Inc.	Henrico County	Isle of Wight County	Town of Clarksville		Town of Gordonsville	Town of Courtland	Charles City County
		Marshall Waterworks	Aqua Virginia		Town of Smithfield	Town of South Hill		Town of Orange		
		Vint Hill Economic Development Authority			Town of Windsor	Town of LaCrosse				
						Roanoke River Public Service Authority				

Source: VEDP

8.1.4 Natural Gas Providers

Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
n/a	Columbia Gas of Virginia	Columbia Gas of Virginia	n/a	Columbia Gas of Virginia	Columbia Gas of Virginia	Columbia Gas of Virginia	n/a	Columbia Gas of Virginia	Columbia Gas of Virginia	Atmos Energy
										Virginia Natural Gas

Source: VEDP

8.1.5 Telecommunications Providers

Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Verizon Virginia	Verizon Virginia	Verizon Virginia	Sprint/United Telephone-Southeast	Sprint/Centel-Virginia	Verizon South	Verizon South	nTelos	Cavalier Telephone Company	Cox Communications	Verizon-Virginia
Comcast Business Communications	nTelos	Verizon South		Verizon-Virginia	Charter Communications	Buggs Island Telephone Cooperative	Sprint/Centel-Virginia	AT&T	Cavalier Telephone Company	
	Shentel					CenturyLink	Verizon-Virginia	Comcast Business Communications	Verizon-Virginia	
						AT&T		Verizon South	Charter Communications	
						Mid-Atlantic Broadband Cooperative				

Source: VEDP

8.2 ELECTRIC RATES

8.2.1 Industrial Customer

Cost per kWh for an Industrial Customer with a demand of 1,000 kW and using 650,000 kWh/month (90% load factor)

	Cost/kWh	Monthly Total
Dominion Virginia Power	\$0.0568	\$36,920
Appalachian Power	\$0.0667	\$43,355
Town of Bedford	\$0.0633	\$41,115
Southside Electric Coop	\$0.0813	\$52,869

Source: Edison Electric Institute's "Typical Bills and Average Rates Report - Winter 2015" (DVP & AEP);
 Otherwise, SEC & Town of Bedford

Calculation: average cost per kWh X the number of kWh

8.2.2 Commercial Customer

Cost per kWh for a Commercial Customer with a demand of 500 kW and using 180,000 kWh/month (50% load factor)

	Cost/kWh	Monthly Total
Dominion Virginia Power	\$0.0808	\$14,544
Appalachian Power	\$0.0928	\$16,704
Town of Bedford	\$0.0924	\$16,632
Southside Electric Coop	\$0.0985	\$17,727

Source: Edison Electric Institute's "Typical Bills and Average Rates Report - Winter 2015" (DVP & AEP);
 Otherwise, SEC & Town of Bedford

Calculation: average cost per kWh X the number of kWh

8.3 SEWER RATES

Provider	Connection / Tap fees	Utilization Rates
Powhatan County	Facility Fee sewer 1": \$22,500	Commodity cost charge per 1,000 gallons: \$4.84
	Bi-Monthly capacity charge 1": \$68.13	
	Meter fee 1": \$515	
Bedford Regional Water Authority (inside town of Bedford)	Facility fee sewer 1": \$8,700	
	Connection fees sewer 1" \$1,200	Commodity Charges per 1000 gallons—Industrial (400,000 gallon per month minimum) in Town of Bedford; First 600,000: \$5.41 / Over 600,000: \$4.70
	Monthly fixed charge 1": \$46.94	
	Meter fee 1": \$250	Commodity Charges per 1000 gallons—Commercial; First 3,000: \$0.0 / next 7,000: \$7.32 / next 30,000: \$6.83 / next 60,000: \$6.47 / next 100,000: \$6.06 / Over 200,000: \$5.31
Bedford Regional Water Authority (Forest, Lakes, Stewartsville, Montvale Service Areas)	Facility fee sewer 1": \$8,700	Commodity Charges per 1000 gallons—Industrial (400,000 gallon per month minimum); First 600,000 and over: Sewer: \$6.90
	Connection fees sewer 1" \$1,200	
	Monthly fixed charge 1": \$22.07	
	Meter fee 1": \$250	Commodity Charges per 1000 gallons—Commercial; \$7.05
Fauquier County Water & Sewer Authority	Availability fee 1": \$35,000	Usage fees (per 1,000 gallons): \$7.27
	Basic Monthly Service Fees 1": \$53.12	
	Sewer Availability Surcharges (\$10,000 may apply)	
Fluvanna County Public Works	Public water and sewer are available at Lake Monticello and portions of Palmyra. Public water service is available in portions of Fork Union.	
Goochland County	Connection fee 1": \$14,308	Volume Charge per 1,000 gallons: \$11.56 (4,000 gallon minimum)
	Service charge may be applicable	
Isle of Wight County	Connection fee 1": \$6,400 plus \$0.33 per square foot of gross floor area	Rate per 1,000 gallons: Up to 20,000: \$6.00; Over 20,000 gallons: \$4.50
Town of South Hill	Minimum bill for commercial water and sewer is \$40.22	Sewer rates are 110% x the water rate (see below)

Provider	Connection / Tap fees	Utilization Rates
Nelson County Water & Sewer Authority	Connection fee: \$10,000	Usage fees for sewer usage over 4,000 gallon minimum (per 1,000 gallons): \$9.90
	Basic service fee (up to 4,000 gallons/billing): \$47.05	
	Availability fee: \$5/month	
Rapidan Service Authority: Gordonsville Sewer System	Minimum Monthly Charge 0-2,000 gal: \$16.66	Rate Per 1000 Gallons: \$6.83
	Availability Fee Per EDU: \$10,000	% of Water Usage: 90%
Southampton County	Facility Fee 1": \$9,000	Rate per 1,000 gallons: Up to 4,000: \$34.00 Over 4,000 gallons: \$7.00
	Connection fee: \$1,800/unit	
Charles City County	Connection Fee 1": \$1,500	Rate per 1,000 gallons: 0-2,000: \$10 (minimum) 2,001-5,000: \$3.00 5,001-10,000: \$2.50 Over 10,001: \$2.25
	Availability fee: \$1,500	

Source: Utility Providers

8.4 WATER RATES

Water	Connection / Tap fees	Utilization Rates
Powhatan County	Facility Fee water: 1": \$10,250	Commodity cost charge per 1,000 gallons: \$4.56
	Bi-Monthly capacity charge 1": \$54.08	
	Meter fee 1" \$515	
Bedford Regional Water Authority (inside town of Bedford)	Facility fee: 1" \$6,300	Commodity Charges per 1000 gallons–Industrial (400,000 gallon per month minimum); First 600,000: \$2.97 / Over 600,000: \$2.63
	Connection fees: 1" \$1,200	
	Monthly fixed charge 1": \$35	Commodity Charges per 1000 gallons–Commercial; First 3,000: \$0.0 / next 7,000: \$4.25 / next 30,000: \$2.90 / next 60,000: \$2.70 / next 100,000: \$2.85 / Over 200,000: \$2.80
	Meter fee 1" \$250	

Water	Connection / Tap fees	Utilization Rates
Bedford Regional Water Authority (Montvale)	Facility fee: 1" \$6,300	Commodity Charges per 1000 gallons—Industrial (400,000 gallon per month minimum); First 600,000 and over: \$5.11
	Connection fees: 1" \$1,200	
	Monthly fixed charge 1": \$25	Commodity Charges per 1000 gallons—Commercial: \$5.37
	Meter fee 1" \$250	
Fauquier County Water & Sewer Authority	Availability fee 1": \$22,250	Usage Fee + Usage Fee Surcharge (per 1,000 gallons)
	Basic Monthly Service Fees 1": \$55.43	0-7,000: \$3.70 + \$4.00
	Monthly Base Service Fee Surcharges: \$45.63	7,001-10,000: \$4.63 + \$8.00
	Water availability surcharges (\$8,125) may apply	10,001-20,000: \$5.09 + \$8.00
		20,001-30,000: \$5.55 + \$8.00
		30,001-40,000: \$6.01 + \$8.00
		40,001-50,000: \$6.48 + \$8.00
		50,001+: 6.93 + \$8.00 Additional demand charges for usage >35,000 gallons/month
Fork Union Sanitary District	Public water and sewer in Fluvanna are available at Lake Monticello and portions of Palmyra. Public water service is available in portions of Fork Union.	
Goochland County	Water connection fee 1": \$7,998	Volume Charge per 1,000 gallons: \$7.71 (4,000 gallon minimum)
	Service charge 5/8" non-residential: \$25	
Isle of Wight County	Connection fee 1": \$12,600	Rate per 1,000 gallons: Up to 25,000: \$8.25 Over 25,000 gallons: \$7.25
	Meter fee: \$42/month	

Water	Connection / Tap fees	Utilization Rates
Town of South Hill	Service charge: see next column	Volume Charge per 1,000 gallons in town of South Hill: outside town rates = 2x town rates
		Up to 3,000 gallons: \$5.55+\$2.50 service charge
		3,001 to 10,000 gallons: \$5.55+\$3.00 service charge
		10,001 to 50,000 gallons: \$5.20+\$7.00 service charge
		50,001 to 100,000 gallons: \$3.95+\$85 service charge
		>100,000 gallons: \$3.80+\$110 service charge
Nelson County Water & Sewer Authority	Connection fee: \$10,000	Usage fees for sewer usage over 4,000 gallon minimum (per 1,000 gallons): \$10.50
	Basic service fee (up to 4,000 gallons/billing): \$38.20	
	Availability fee: \$3.50/month	
Rapidan Service Authority: Orange County, Rte. 15 Water System	Minimum Monthly Charge 0-2000 gal: \$13.20	Rate Per 1,000 Gallons: \$5.10
	Availability Fee Per EDU: \$10,000	Summer Conservation Surcharge: For usage over 6000 gallons (July-October): Additional \$1.00/1000 Gallons
		Town of Gordonsville Wholesale Rate: \$3.83
Rapidan Service Authority: Orange County, Rte. 20 Water System	Minimum Monthly Charge 0-2000 gal: \$7.72	Rate Per 1,000 Gallons: \$2.36
	Availability Fee Per EDU: \$10,000	Summer Conservation Surcharge: For usage over 6000 gallons (July-October): Additional \$1.00/1000 Gallons
Southampton County	Facility Fee 1": \$5,000	Rate per 1,000 gallons: Up to 4,000: \$26; Over 4,000 gallons: \$5.00
	Connection Fee 1": \$1,500/unit	
Charles City County	Connection Fee 1": \$1,500	Rate per 1,000 gallons: 0-2,000: \$10 (minimum) 2,001-5,000: \$3.00 5,001-10,000: \$2.50 Over 10,001: \$2.25
	Availability fee: \$1,500	

Source: Utility Providers

9 AGRICULTURE

9.1 AGRICULTURE OVERVIEW

Agriculture Overview	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City
Farms (number)	250	1,369	1,258	303	315	213	527	455	547	335	79
Land in farms (acres)	32,081	206,534	228,285	47,077	50,142	75,642	145,493	79,981	104,806	153,831	31,182
Average size of farm (acres)	128	151	181	155	159	355	276	176	192	459	395
Median size of farm (acres)	60	83	50	87	47	50	120	98	82	155	55
Estimated market value of land and buildings:											
Average per farm	\$735,120	\$668,345	\$1,439,924	\$791,935	\$868,709	\$1,262,987	\$710,929	\$805,228	\$1,292,497	\$1,224,989	\$1,482,449
Average per acre	\$5,729	\$4,430	\$7,935	\$5,097	\$5,457	\$3,556	\$2,575	\$4,581	\$6,746	\$2,668	\$3,756
Estimated market value of all machinery and equipment (\$1,000)	\$12,148	\$80,420	\$91,880	\$16,842	\$19,494	\$35,172	\$52,957	\$28,845	\$52,368	\$61,618	\$17,488
Average per farm	\$48,590	\$58,743	\$73,037	\$55,584	\$61,885	\$165,126	\$100,487	\$63,397	\$95,737	\$183,935	\$221,369
Farms by size:											
1 to 9 acres	27	57	104	12	27	30	25	32	36	21	4
10 to 49 acres	78	411	502	97	137	71	83	100	158	67	30
50 to 179 acres	84	558	390	115	97	51	223	200	202	94	15
180 to 499 acres	48	274	164	59	35	17	133	96	110	47	17
500 to 999 acres	10	46	53	17	12	12	34	17	19	50	4
1,000 acres or more	3	23	45	3	7	32	29	10	22	56	9
Farms by size (%):											
1 to 9 acres	10.8%	4.2%	8.3%	4.0%	8.6%	14.1%	4.7%	7.0%	6.6%	6.3%	5.1%
10 to 49 acres	31.2%	30.0%	39.9%	32.0%	43.5%	33.3%	15.7%	22.0%	28.9%	20.0%	38.0%

Agriculture Overview	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City
Farms by size (%):											
50 to 179 acres	33.6%	40.8%	31.0%	38.0%	30.8%	23.9%	42.3%	44.0%	36.9%	28.1%	19.0%
180 to 499 acres	19.2%	20.0%	13.0%	19.5%	11.1%	8.0%	25.2%	21.1%	20.1%	14.0%	21.5%
500 to 999 acres	4.0%	3.4%	4.2%	5.6%	3.8%	5.6%	6.5%	3.7%	3.5%	14.9%	5.1%
1,000 acres or more	1.2%	1.7%	3.6%	1.0%	2.2%	15.0%	5.5%	2.2%	4.0%	16.7%	11.4%
Total cropland (farms)	164	1,067	713	221	176	168	417	358	370	275	58
Total cropland (acres)	10,551	59,122	82,203	13,633	19,499	50,029	50,846	22,429	40,460	94,267	21,393
Harvested cropland (farms)	146	1,002	638	194	161	136	363	325	332	204	49
Harvested cropland (acres)	8,799	52,837	67,805	11,717	17,261	47,868	40,376	19,542	36,208	87,902	20,697
Irrigated land (farms)	15	30	62	21	15	12	67	37	29	20	10
Irrigated land (acres)	100	94	395	144	31	702	2,760	862	564	3,246	1,435
Market value of agricultural products sold (\$1,000)	\$10,009	\$28,283	\$53,948	\$4,722	\$16,562	\$45,625	\$42,895	\$15,807	\$90,577	\$79,164	\$23,680
Average per farm	\$40,037	\$20,660	\$42,884	\$15,584	\$52,577	\$214,204	\$81,395	\$34,740	\$165,589	\$236,311	\$299,751
Crops, incl. nursery/greenhouse crops (\$1,000)	\$3,909	\$6,950	\$21,587	\$2,965	\$8,311	\$33,025	\$35,386	\$10,377	\$64,929	\$67,002	(D)
Livestock, poultry, and their products (\$1,000)	\$6,100	\$21,333	\$32,361	\$1,757	\$8,250	\$12,600	\$7,509	\$5,430	\$25,648	\$12,162	(D)
Farms by value of sales:											
Less than \$2,500	121	522	554	129	161	83	201	158	199	118	32
\$2,500 to \$4,999	39	134	158	59	30	13	63	51	50	11	7
\$5,000 to \$9,999	27	249	136	25	50	11	74	61	65	26	8
\$10,000 to \$24,999	32	272	177	45	35	28	63	87	101	26	5
\$25,000 to \$49,999	14	107	87	29	17	17	50	68	45	25	5

\$50,000 to \$99,999	7	46	65	9	8	13	15	10	36	22	3
\$100,000 or more	10	39	81	7	14	48	61	20	51	107	19
Agriculture Overview	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City
Farms by value of sales:											
Less than \$2,500	48.4%	38.1%	44.0%	42.6%	51.1%	39.0%	38.1%	34.7%	36.4%	35.2%	40.5%
\$2,500 to \$4,999	15.6%	9.8%	12.6%	19.5%	9.5%	6.1%	12.0%	11.2%	9.1%	3.3%	8.9%
\$5,000 to \$9,999	10.8%	18.2%	10.8%	8.3%	15.9%	5.2%	14.0%	13.4%	11.9%	7.8%	10.1%
\$10,000 to \$24,999	12.8%	19.9%	14.1%	14.9%	11.1%	13.1%	12.0%	19.1%	18.5%	7.8%	6.3%
\$25,000 to \$49,999	5.6%	7.8%	6.9%	9.6%	5.4%	8.0%	9.5%	14.9%	8.2%	7.5%	6.3%
\$50,000 to \$99,999	2.8%	3.4%	5.2%	3.0%	2.5%	6.1%	2.8%	2.2%	6.6%	6.6%	3.8%
\$100,000 or more	4.0%	2.8%	6.4%	2.3%	4.4%	22.5%	11.6%	4.4%	9.3%	31.9%	24.1%
Govt. payments (farms)	40	162	124	45	30	109	187	48	90	254	24
Govt. payments (\$1,000)	\$128	\$897	\$865	\$123	\$291	\$1,689	\$1,229	\$116	\$1,081	\$6,268	\$744
Total income from farm-related sources, gross before taxes and expenses:											
Farms	74	478	507	101	90	86	162	157	226	159	39
\$1,000	\$1,042	\$2,750	\$6,461	\$1,255	\$1,291	\$1,568	\$1,772	\$1,882	\$2,802	\$4,020	\$552
Total farm production expenses (\$1,000)	\$11,102	\$32,967	\$81,290	\$7,073	\$17,887	\$36,405	\$37,605	\$17,664	\$89,804	\$66,149	\$16,626
Average per farm	\$44,406	\$24,081	\$64,619	\$23,344	\$56,783	\$170,915	\$71,357	\$38,822	\$164,175	\$197,459	\$210,461
Net cash farm income of operation (farms)	250	1,369	1,258	303	315	213	527	455	547	335	79
Net cash farm income of operation (\$1000)	\$77	-\$1,038	-\$20,016	-\$974	\$257	\$12,477	\$8,291	\$141	\$4,657	\$23,304	\$8,350
Average per farm	\$307	-\$758	-\$15,911	-\$3,214	\$816	\$58,578	\$15,732	\$309	\$8,513	\$69,564	\$105,701
Principal operator by primary occupation:											
Farming (number)	121	585	548	131	129	109	236	164	260	201	46
Other (number)	129	784	710	172	186	104	291	291	287	134	33
Principal operator by days worked off farm:											

Any (number)	150	847	765	188	182	118	291	310	328	161	40
200 days or more (number)	105	575	442	113	133	95	198	223	246	98	29

Source: Census of Agriculture 2012; D: Withheld to avoid disclosing data for individual farms. // - : Represents zero.

9.2 LAND IN FARMS BY LAND USE, 2012

	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Cropland	32.9%	28.6%	36.0%	29.0%	38.9%	66.1%	34.9%	28.0%	38.6%	61.3%	68.6%
Woodland	39.2%	30.4%	19.5%	39.1%	27.1%	19.5%	40.2%	35.3%	25.9%	31.0%	21.7%
Pastureland	21.0%	36.9%	37.0%	26.4%	28.8%	5.3%	19.8%	32.1%	29.5%	-	-
Other Uses	6.8%	4.1%	7.5%	5.5%	5.2%	9.1%	5.1%	4.5%	5.9%	7.8%	9.7%

Source: Census of Agriculture 2012

9.3 VALUE OF SALES BY COMMODITY

	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Sheep, goats, wool, mohair, and milk											
Farms: 2012	4	50	90	8	5	17	17	14	29	17	7
Farms: 2007	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	11	8	(NA)	(NA)	(NA)
\$1,000: 2012	\$2	\$115	\$156	\$21	\$18	\$53	\$33	\$109	\$118	(D)	\$34
\$1,000: 2007	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	\$74	\$26	(NA)	(NA)	(NA)
Horses, ponies, mules, burros, and donkeys											
Farms: 2012	19	65	151	20	30	7	2	2	45	3	6
Farms: 2007	15	89	146	2	31	8	2	2	29	10	12
\$1,000: 2012	\$191	\$301	\$2,141	\$94	\$264	\$78	(D)	(D)	\$935	\$8	\$94
\$1,000: 2007	\$135	\$213	\$10,641	(D)	\$683	\$262	(D)	(D)	\$5,944	\$22	\$50

Source: Census of Agriculture 2012

9.3.1 Alpacas

Alpacas	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Farms	8	13	19	3	10	5	2	3	7	-	5
Number	66	217	256	80	165	62	D	36	306	-	68
Sales:											
Farms	-	-	7	1	2	1	-	-	5	-	-
Number	-	-	34	D	D	D	-	-	14	-	-
Value (\$1,000)	-	-	\$80	D	D	D	-	-	\$13	-	-

Source: Census of Agriculture 2012

9.3.2 Llamas

	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City
Farms	5	19	21	1	7	4	5	5	-	2	2
Number	19	56	86	D	19	14	12	17	-	D	D
Sales:											
Farms	-	1	1	-	-	-	-	-	-	-	-
Number	-	D	D	-	-	-	-	-	-	-	-
Value (\$1,000)	-	D	D	-	-	-	-	-	-	-	-

Source: Census of Agriculture 2012

9.3.3 All Goats

	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City
Farms	11	88	132	15	24	31	49	39	37	20	5
Number	29	1,137	1,601	106	221	438	735	603	717	650	219
Sales:											
Farms	3	35	55	3	4	14	24	15	20	12	5
Number	9	631	457	34	47	287	213	534	334	432	191
Value (\$1,000)	\$1	\$72	\$56	D	\$3	\$24	\$21	\$86	\$45	\$66	\$32

Source: Census of Agriculture 2012

9.3.4 Angora Goats

	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City
Farms	2	3	20	5	-	-	1	4	2	1	-
Number	D	8	259	D	-	-	D	12	D	D	-
Sales:											
Farms	-	-	1	1	-	-	-	-	-	1	-
Number	-	-	D	D	-	-	-	-	-	D	-
Value (\$1,000)	-	-	D	D	-	-	-	-	-	D	-
Mohair	-	-			-	-		-	-	-	-
Farms	-	-	15	1	-	-	1	-	-	-	-
Pounds	-	-	1237	D	-	-	D	-	-	-	-
Value (\$1,000)	-	-	D		-	-	D	-	-	-	-

Source: Census of Agriculture 2012

9.3.5 Milk Goats

	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City
Farms	-	24	48	1	-	6	4	10	12	-	1
Number	-	296	324	D	-	76	D	176	D	-	D
Sales:											
Farms	-	10	20	1	-	4	4	5	7	-	1
Number	-	125	D	D	-	D	D	50	116	-	D
Value (\$1,000)	-	21	D	D	-	D	D	9	12	-	D

Source: Census of Agriculture 2012

9.3.6 Meat Goats

	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City
Farms	9	69	88	12	24	28	47	31	26	19	4
Number	D	833	1018	84	221	362	634	415	530	D	D
Sales:											
Farms	3	25	37	2	4	11	22	11	15	11	4
Number	9	506	327	D	47	D	176	484	218	D	D
Value (\$1,000)	\$1	\$51	\$35	D	\$3	D	\$18	\$77	\$34	D	D

Source: Census of Agriculture 2012

9.3.7 Sheep and Lambs

	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City
Sheep and lambs inventory: farms, 2012	3	33	87	10	11	7	2	14	21	12	3
Sheep and lambs inventory: farms, 2007	7	32	45	11	19	2	9	11	28	9	5
Sheep and lambs inventory: number, 2012	(D)	365	1,256	202	127	75	(D)	531	465	596	90
Sheep and lambs inventory: number, 2007	126	378	845	258	231	(D)	51	546	1,075	302	44
2012 farms by inventory:											
1 to 24: farms	2	30	75	7	10	6	2	7	19	5	2
1 to 24: number	(D)	187	561	38	(D)	(D)	(D)	(D)	(D)	(D)	(D)
25 to 99: farms	1	3	10	3	1	1	-	6	-	5	1
25 to 99: number	(D)	178	(D)	164	(D)	(D)	-	339	-	260	(D)
100 to 299: farms	-	-	2	-	-	-	-	1	2	2	-
100 to 299: number	-	-	(D)	-	-	-	-	(D)	(D)	(D)	-
300 to 999: farms	-	-	-	-	-	-	-	-	-	-	-
300 to 999: number	-	-	-	-	-	-	-	-	-	-	-
1,000 or more: farms	-	-	-	-	-	-	-	-	-	-	-
1,000 or more: number	-	-	-	-	-	-	-	-	-	-	-
Ewes 1 year old or older: farms, 2012	1	26	58	6	7	3	-	14	19	9	3
Ewes 1 year old or older: farms, 2007	7	22	32	9	7	-	5	8	23	9	3
Ewes 1 year old or older: number, 2012	(D)	199	781	131	84	(D)	-	332	325	302	48
Ewes 1 year old or older: number, 2007	84	196	467	159	95	-	11	183	726	237	8

	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City
Wool production: farms, 2012	2	14	50	4	-	8	2	3	13	1	-
Wool production: farms, 2007	4	8	27	5	6	-	-	4	12	5	-
Wool production: pounds, 2012	(D)	790	3,270	270	-	452	(D)	340	2,342	(D)	-
Wool production: pounds, 2007	(D)	766	2,481	860	828	-	-	1,938	4,119	990	-
Wool production: \$1,000, 2012	-	(Z)	4	(D)	-	(D)	-	(Z)	(Z)	(D)	-
Wool production: \$1,000, 2007	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)
Sheep and lambs sold: farms, 2012	1	16	31	6	1	8	-	9	9	10	3
Sheep and lambs sold: farms, 2007	1	18	19	11	-	-	-	7	15	8	3
Sheep and lambs sold: number, 2012	(D)	121	449	120	(D)	21	-	202	325	413	14
Sheep and lambs sold: number, 2007	(D)	122	537	118	-	-	-	251	350	198	18
Sheep and lambs sold: \$1,000, 2012	(D)	14	72	17	(D)	4	-	29	57	36	2
Sheep and lambs sold: \$1,000, 2007	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)	(NA)

- Represents zero.

(D) Withheld to avoid disclosing data for individual farms.

(NA) Not available.

Source: Census of Agriculture 2012

9.3.8 Horses and Ponies

Horses and Ponies:	Powhatan County	Bedford County	Fauquier County	Fluvanna County	Goochland County	Isle of Wight County	Mecklenburg County	Nelson County	Orange County	Southampton County	Charles City County
Farms (total)	104	376	569	96	152	47	96	89	168	37	26
Number (total)	895	2,506	5,282	820	1,195	452	540	465	1,908	264	194
Farms (owned)	95	364	551	89	144	45	93	86	160	36	26
Number (owned)	525	2,025	4,010	619	810	268	502	386	1,497	254	150
Sales (total):											
Farms	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Number	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Value (\$1,000)	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Sales (owned):											
Farms	18	59	147	19	30	7	14	13	45	3	6
Number	47	178	450	45	69	17	26	53	153	7	12
Value (\$1,000)	\$191	\$294	\$2,139	\$92	\$264	\$78	\$32	\$107	\$934	\$8	\$94

Source: Census of Agriculture 2012

10 LAND PRICES & LEASE RATES

	Powhatan County	Fluvanna County	Goochland County	Isle of Wight County	Nelson County	Orange County
# Existing Buildings	121	54	102	270	30	136
Total Existing Space (SF)	1,167,292	716,490	850,446	6,143,989	378,785	2,391,187
Vacancy Rate	13.1%	39.3%	10.3%	7.9%	0.3%	7.0%
Rent per SF	\$9.12	\$3.62	\$9.11	\$4.79	\$14.00	\$8.32
Land Price per Acre (median)	\$70,000	\$214,286	\$62,860	\$46,483	\$773,844	\$43,515

Source: CoStar

11 TOURISM ASSETS

11.1 ACCOMMODATIONS

11.1.1 Existing Accommodations

Name	Address	Phone	Website
Erin Hill Bed & Breakfast	3840 Old Buckingham RD	closed	www.erinhillbb.com
The Inn at Three Bridge	3081 Three Bridge RD	closed	www.threebridgeinn.com
Cozy Acres Family Campground	2177 Ridge Road	804-598-2470	www.cozyacres.com
Manakintowne-West Cottage	Federal Hill Farm Road	804-379-8253	www.manakintowne.com/#!west-cottage_1_bedroom_cottage
The Lodge/Foundry Golf Club	3225 Lee's Landing Road	804-598-9898	www.foundrygolfclub.com

11.1.2 Proposed Accommodations

Name	Address	Phone	Website	Notes
Fine Creek Mill	2425 Robert E. Lee RD	804-379-8211	www.themillatfinecreek.com	County Inn and Brewery proposed

11.2 ATTRACTIONS

Name	Address	Phone	Website
Appomattox River			
James River			
Belmead/Francis d. Sales	5002 Cartersville Road	804-598-8938	www.francisemma.org
Powhatan Courthouse Village	3810 Old Buckingham Rd	804-598-5660	www.virginia.org/Cities/Powhatan
Powhatan Driving Tour	3810 Old Buckingham Rd	804-598-5660	www.virginia.org/Cities/Powhatan
Powhatan Fairgrounds	4042 Anderson Hwy	804-598-9808	www.powhatanfair.org
Powhatan Historical Society	3810 Old Buckingham Rd	804-598-1139	www.powhatanhistoricalsociety.org

Name	Address	Phone	Website
Powhatan State Park	4616 Powhatan State Park Rd.	804-598-7148	www.virginia.org/cities/Powhatan
Powhatan Village Hist. Walk Tour	3810 Old Buckingham Rd	804-598-5660	www.virginia.org/Cities/Powhatan
Powhatan Wildlife Management	W of Courthouse on Route 60 or Route 13 South	na	www.dgif.state.va.us
The Mill At Fine Creek	2434 Robert E. Lee Road	804-379-8211	www.themillatfinecreek.com
Virginia Civil War Trail Sites			
Derwent	6000 Derwent Road		
Huguenot Springs Confed. Cemetery	911 Old Confederate Cemetery Road		
Lee's Last Bivouac	2630 Huguenot Trail		

11.3 ARTS

Name	Address	Phone	Website
Performing Arts Foundation	1664 Anderso Hwy.	804-403-3755	www.artsifpowhatan.org
Premiere Dance Studio	1685 Anderson Hwy	804-382-2117	www.dancepds.com
Southside Arts Music & Theatre	1799 South Creek One Units G & H	804-615-9477	www.southsideepa.com
Stars in Motion	3860 Old Buckingham Road	804-378-7860	www.starsinmotionpaa.com
Sunshine Arts & Lessons	3452 A Anderson	804-384-2117	www.sunshineartandlessons.com
Tu Left Feet		804-598-3388	www.tuleftfeet.com

11.4 CHURCHES & CEMETERIES

Name	Address	Website
Corinth Christian Church	2901 Judes Ferry Road	www.powhatanhistoricalsociety.org/cemetery/corinth-christian-ch.html
Emmanuel Episcopal Church	2390 Emmanuel Road	www.powhatanhistoricalsociety.org/cemetery/emmanuel-epis-cem.html
Fire Creek Baptist Church	3619 Huguenot Trail	www.powhatanhistoricalsociety.org/cemetery/finecreek-cem.html
Grace Church Cemetery	Rocky Ford Road	www.powhatanhistoricalsociety.org/cemetery/grace-church-cem.html
Hollywood Baptist Church	3964 Old Buckingham Road	www.powhatanhistoricalsociety.org/cemetery/hollywood-bapt-cem.html
Huguenot Springs Confederate Cemetery	911 Old Confederate Cemetery Road	www.powhatanhistoricalsociety.org/cemetery/csa-cem.html
Little Zion Baptist Church	5680 Catersville Road	www.powhatanhistoricalsociety.org/cemetery/little-zion-cem.html
Manakin Episcopal	985 Huguenot Trail	www.powhatanhistoricalsociety.org/cemetery/manakin-epis-cem.html
Mount Moriah Baptist Church	5780 Mount Moriah Road	www.powhatanhistoricalsociety.org/cemetery/mt-moriah-cem.html
Muddy Creek Baptist Church	3470 Trenholm Road	www.powhatanhistoricalsociety.org/cemetery/muddy-creek-cem.html
Shiloh Baptist Church	Old River Trail	www.powhatanhistoricalsociety.org/cemetery/shiloh-baptist-ch.html
St. Luke Episcopal Church	2245 Huguenot Trail	www.powhatanhistoricalsociety.org/cemetery/stluke-epis-ch-cem.html
St. James	Old River Trail	www.powhatanhistoricalsociety.org/cemetery/st-james-cem.html

11.5 EQUESTRIAN SERVICES

Name	Address	Phone	Website
Bella Cavalo Farm	1535 Rocky Ford RD	804-598-3049	
Belmead Stables/Riding Club	5000 Cartersville RD	804-598-4904	www.belmeadstablesandriddingclub.com
Brently Woods Stables	1960 Mill Quarter RD	804-548-3533	www.lehnigeventing.com
Catalyst Driving Center	Capeway RD	804-837-4888	www.aikendrivingclub.com
Cedar Ridge Farm	1703 Calis Trail	804-397-9635	www.varetreat.com/listing/55437
Cottonglen	2170 Huguenot Trail	804-897-1421	
Deep Creek Stables	5350 Anderson Hwy	434-547-9638	
Deer Creek Equine Clinic	2884 Maiden Road	804-598-3959	www.deercreekequine.com
Double D Farm	2221 Sigourney Street	804-598-0934	

Name	Address	Phone	Website
Garland Farm	915 Dorset Road	804-598-3657	www.tommygarland.com
Heatherworld Stables	4206 Michaus Grant Road	804-598-4955	
Hertizler Farm & Feed, Inc.	3209 Buckingham Road	804-598-4021	www.hffinc.com
Hunter's Ridge Equestrian Center	2418 Mill Road	804-393-1459	www.huntersridgeequestriancenter.com
Just-a-wee Morgans	1695 Anderson Hwy	804-378-3514	www.stonelakemorgans.com/Justaweemorgans/justaweewebindex.htm
Level Green Riding School	3350 John Tru Hill Road	804-794-8463	www.levelgreenriding.com
Levremont	3066 Ballsville Road	804-338-6061	www.levremont.com
Lightfoot Farm	3259 Maidens Road	804-598-1197	
Lonesome Dove Equestrian Center	6137 Old Buckingham Road	804-357-9524	www.ldequestriancenter.com
Mesa Vista Therapeutics	2650 Judes Ferry Road	804-598-1543	www.mesavistafarm.com
Meteor Hill Welsh	3341 Medway Lane	804-794-7131	www.meteorhill.com
Oakdale Farm	5719 Carterville Road	804-375-3007	www.oakdalehorsefarm.com
Oakleigh Arabian Farm	1507 Dorset Road	804-598-2090	www.oakleigharabians.com
Passage International Riding Academy	1956 Mill Quarter Road	804-598-8955	
Quarterfield Stables	3205 Buckingham Road	804-239-4980	www.powhatanquestrian.com/default.asp
Redwind Farm	1655 Dorset Road	804-598-6270	
Saddlebrook Stables	975 Rocky Ford Road	804-598-9638	www.saddlebrookstables.com
Specialized Equine Services	5350 Anderson Hwy	434-547-9638	www.specializedequine.webstarts.com
Summerhill Stables	2211 Huguenot Trail	804-379-9248	www.summerhillstables.com/Home.html
Windsor Farm Stables	2600 Huguenot Trail	804-598-2679	
Zephyr's Way Stable	2502 Genito Road	434-906-6626	www.zephyrswaystable.com

11.6 EVENTS

Name	Address	Phone	Website
Powhatan County Fair	4042 Anderson Hwy	804-598-9808	www.powhatanfair.org
Powhatan Festival of Fiber	3920 Marion Harland Lane	804-598-9696	www.powhatansfestivaloffiber.com
Powhatan Fourth of July	1960 Old Tavern, Vista Del Lago	804-598-8661	
Powhatan Historic Bike Tour	3880 Old Budkingham Road/Courthouse	804-598-0959	www.powhatanbiketour.com
Powhatan Lions Club 39th Annual	3920 Marion Harland Drive	804-794-1440	
Powhatan Spring Antique Power Show	2455 Academy Road	804-598-4464	www.powhatanpowershow.com
Powhatan Wine Festival	Courthouse Village	804-598-2636	www.powhatanwinefestival.com
Village Vibe Concerts	Courthouse Village	804-598-2636	www.powhatanchamber.org

11.7 FARM TO TABLE/PRODUCE

Name	Address	Phone	Website
Casselmonte Farm		804-598-2457	http://www.casselmontefarm.com
Manakintowne Specialty Growers	2570 Federal Hill Farms	804-379-8253	www.manakintowne.com
Virginia Growers Specialty Produce	2570 Federal Hill Farms	804-379-8253	www.manakintowne.com/#!/photos/c1ysk
Farmer's Market	2470 Anderson HWY-Flatrock Village	804-598-2457	www.powhatanfarmer'smarket.com
Fine Creek Vineyard	2630 Huguenot Trail	804-598-2733	
Hertzler's Farm	3209 Buckingham Road	804-598-4021	www.hffinc.com

11.8 GOATS /ALPACAS/FESTIVAL OF FIBER PARTICIPANTS

Name	Address	Phone	Website
Breeze Hill Farm/The Sheperd's Life	*not found*	804-909-1980	www.breezehillfarm.net
Buck Ridge Farm	1260 Schroeder Road	804-598-0804	
Flint Hill Mini Farm	2413 Flint Hill Road	804-598-2721	www.flinthillminifarm.com
Gem View Farm	1680 Jeter Road	804-598-6768	www.gemviewfarm.com
Holly Spring Homespun	3860 Old Buckingham Road	804-598-2232 – may be closed	www.hollyspringhomespun.com
Moli Ranch	4260 Lockin Circle	804-239-2157	www.openherd.com/farms/1788/the-moli-ranch-inc-
Shady Nook Alpacas	2290 Barley Farms Lane	804-598-5497	www.shadynookalpacas.com
Powhatan Festival of Fiber		804-598-9696	www.powhatansfestivaloffiber.com

11.9 HISTORIC PLACES - NATIONAL REGISTER

Name	Address	Website
Dept. Of Historic Resources	online descriptions of sites in Powhatan found here	www.dhr.virginia.gov/registers/Counties/register_Powhatan.htm
Beaumont	Powhatan State Park Road?	www.dhr.virginia.gov/registers/Counties/Powhatan/Beaumont_photo.htm
Belmead	5000 Cartersville Road	www.dhr.virginia.gov/registers/Counties/Powhatan/Belmead_photo.htm
Belnemus	4950 Anderson HWY	www.dhr.virginia.gov/registers/Counties/Powhatan/Belnemus_photo.htm
Blenheim	6177 Blenheim Road	www.dhr.virginia.gov/registers/Counties/Powhatan/Blenheim_photo.htm
Elmington	3277 Maidens Road	www.dhr.virginia.gov/registers/Counties/Powhatan/NR_Powhatan_Elmington_photographs_page.htm
Emmanuel Episcopal Church	2390 Emanuel Church Road	www.dhr.virginia.gov/registers/Counties/Powhatan/Emmanuel_photo.htm
Fighting Creek Plantation	1811 Mill Quarter Road	www.dhr.virginia.gov/registers/Counties/Powhatan/072-0015.FightingCreekPlantation.photos.html
Fine Creek Mills Historic Dist.	2425-2434	www.dhr.virginia.gov/registers/Counties/Powhatan/NR_Powhatan_FineCreekMill_sHD_Web_photographs.htm
French's Tavern	6100 Old Buckingham Road	www.dhr.virginia.gov/registers/Counties/Powhatan/Frenchs_Tavern_photo.htm

Name	Address	Website
Huguenot Memorial Chapel and Monument	985 Huguenot Trail	www.dhr.virginia.gov/registers/Counties/Powhatan/HuguenotMemChapelMonument_photo.htm
Keswick	Huguenot Trail	www.dhr.virginia.gov/registers/Counties/Powhatan/Keswick_photo.htm
Mosby Tavern	2625 Old Tavern Road	www.dhr.virginia.gov/registers/Counties/Powhatan/MosbyTavern_photographs.htm
Norwood	Huguenot Trail	www.dhr.virginia.gov/registers/Counties/Powhatan/Norwood_photo.htm
Paxton	3032 Genito Road	www.dhr.virginia.gov/registers/Counties/Powhatan/Paxton_photo.htm
Powhatan Courthouse Historic District	3880 Old Buckingham Road	www.dhr.virginia.gov/registers/Counties/Powhatan/PowhatanCourtHouseHD_photo.htm
Provost	1801 Cartersville Road	www.dhr.virginia.gov/registers/Counties/Powhatan/Provost_photo.htm
Red Lane Tavern	3009 Lower Hill Road	www.dhr.virginia.gov/registers/Counties/Powhatan/RedLaneTavern_photo.htm
Rosemont	4747 Cosby Road	www.dhr.virginia.gov/registers/Counties/Powhatan/072-0169_Rosemont_photographs.htm
Somerset	2310 Ballsville Road	www.dhr.virginia.gov/registers/Counties/Powhatan/072-0040_Somerset_photographs.htm
St. Luke's Episcopal Church	2245 Huguenot Trail	www.dhr.virginia.gov/registers/Counties/Powhatan/StLukesEpiscopalChurch_photo.htm

11.10 NURSERIES

Name	Address	Phone	Website
Chadwick & 1 Son Orchids	1240 Dorset Road	804-598-7560	www.chadwichorchids.com
Dirty Hands Garden Center	2603 Anderson Hwy CLOSED	804-598-9845	www.dirtyhandsgardencenter.com
Hudgins Landscape & Nursery	17307 Hull Street	804-639-2931	
Roots and Blooms	4110 Cosby Road	804-330-2916	www.rootsandblooms.com

11.11 RESTAURANTS

Name	Address	Phone	Website
Allen's Chinese Restaurant	2430 Anderson Hwy #G	804-403-3336	www.zomato.com
Angela's Italian Ristorante	3452 Anderson Hwy	804-5980-3781	www.angelasitalianristorante.com
Asiana Bistro	1800 S. Creek One	804-594-3660	www.allmenus.com/va/rivanna/283196-asiana-bistro/menu/
Bruster's Real Ice Cream	2602 Anderson Hwy	804-598-0599	www.brusters.com/powhatan
Café at Maidens	3847 Maidens Road	804-598-1967	
China Taste & Asiana Bistro	1800 S Creek	804-379-1688	http://www.chinatasteasianabistro.com/
County Seat Food & Gathering Place	3883 Old Buckingham Road	804-598-5000	www.thecountyseat.com
Courthouse Coffee & Creamery	3837 Olf Buckingham Road	804-598-5344	
Creek Side Grill	1795 South Creek One	804-379-6569	www.creeksidegrill.biz
Cub Creek Farms BBQ	3452 Anderson Hwy	804-598-7434	www.cubcreekfarmbbq.com
Domino's Pizza	3440 Anderson Hwy	804-598-0900	www.pizza.dominos.com/virginia/powhatan/23139/3440-anderson-hwy/
El Cerro Azul	2650 Anderson Hwy	804-598-8400	www.elcerroazul.com
Four Seasons Restaurant	3867 Old Buckingham Road	804-598-9133	www.4seasonspowhatan.com
Frisby's Restaurant	2150 Anderson Hwy	804-794-7553	
Italian Delight of Powhatan	1795 Southcreek One	804-378-9961	www.italiandelightpizza.com
KFC-Taco Bell	1793 Southcreek One	804-794-8226	www.tacobell.com
Kim's Deli	3460 Maidens Road	804-598-2441	www.exxonmobilstations.com/520232-kims-deli-market-powhatan
Los (Tres) 3 Potrillos	3452 Anderson Hwy	804-598-3998	
Mabel's Espresso Bakery Café	3844 Old Buckingham Road	804-598-5344	
McDonalds	2544 Anderson Hwy	804-59-6289	www.mystore411.com
Mediterraneo	3730 Winterfield Road	804-794-5350	www.mediterraneogrill.com
New China Chinese Restaurant	2105 Anderson Hwy	804-598-8989	
Old Tavern Junction	5500 Anderson Hwy	804-598-7453	
Pizza Hut	2105 Academy Road	804-598-7171	www.order.pizzahut.com/locations/virginia/powhatan/028536
Osaka Hibachi & Sushi	2105 Academy Road	804-372-6807	www.osakahibachisushi.com

Name	Address	Phone	Website
Rosa's Pizza Restaurant	2470 Anderson Hwy	804-598-5244	www.rosapizzarestaurant.com
Sam's Hotdog Stand	2470 Anderson Hwy	804-598-7035	www.samshotdog.com
Sheetz	2600 Anderson	804-598-9474	www.richmondgasprices.com/Sheetz_Gas_Stations/Powhatan/4796
Sweet Shop Donuts Café	1800 A South Creek One	804-379-6800	www.sweetshopdonuts.com
Subway	2105 Academy Road	804-598-7827	www.subway.com
Subway	1950 Anderson	804-795-0005	www.subway.com
Vincenza's Pizza	2300 Genito Road	804-598-9878	
Wendy's	1972 S. Creek One	804-594-2680	
Wild Ginger	3734 Winterfield Road	804-378-6988	http://www.wildgingerva.com
Catering/Mobile Units			
Granny's ice Creamey	20521 Skinquarter Road	804-310-6171	www.grannyicecream.com
Gregory's Grill		804-317-4010	
JaDeans Smokin Six O	1300 Huguenot Road	804-3174010	
Turner's Barbecue	1901 Anderson ©	804-379-1440	

11.12 RECREATION

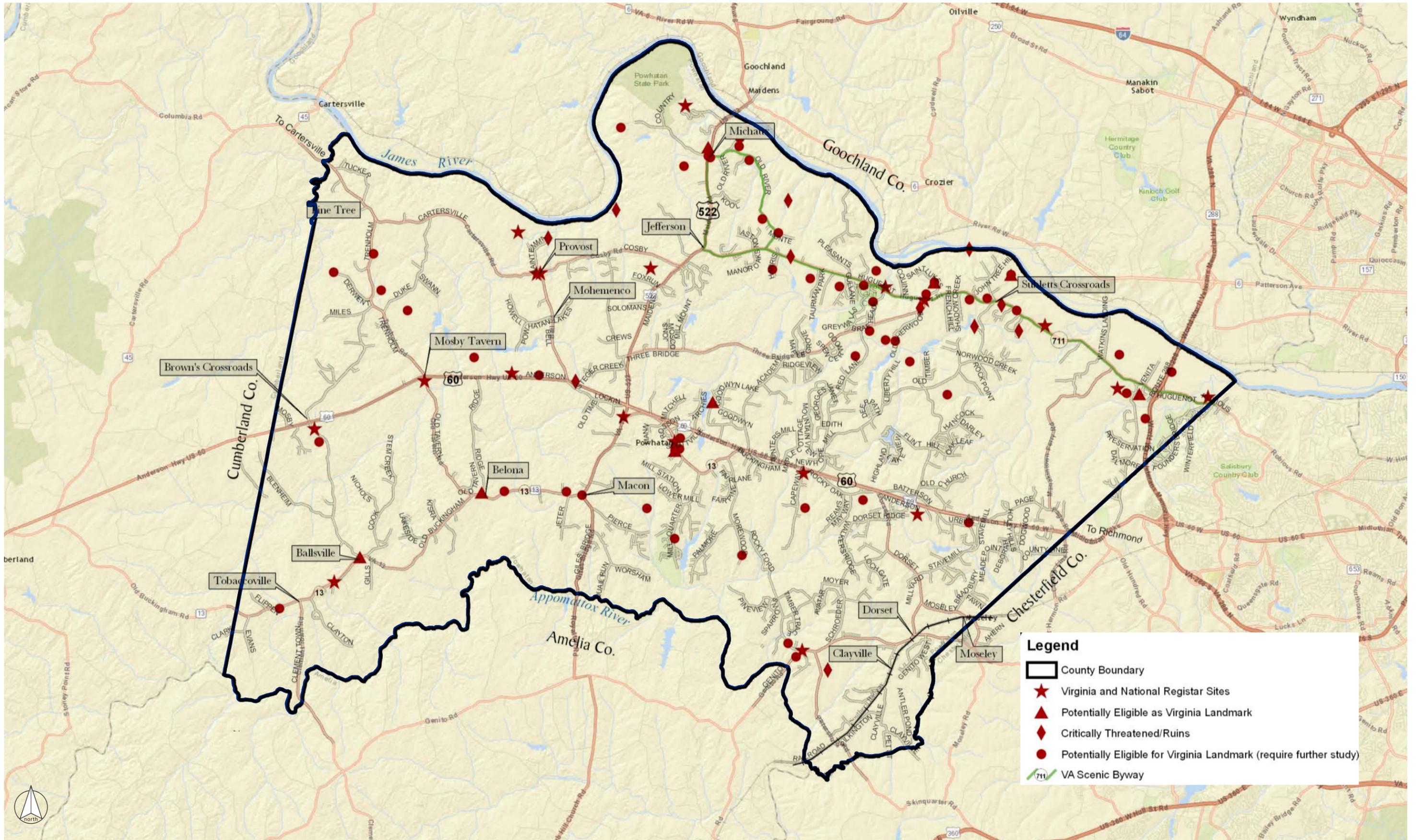
Name	Address	Phone	Website
James River Public Boat Ramps	Beaumont @ 522 & Watkins Landing		
Powhatan Parks & Recreation	3849Old Buckingham Road	804-598-5275	www.powhatanparksandrecreation.com
Powhatan Soccer Association	meetings-1793 South Creek One		www.powhatansoccer.org
Powhatan YMCA	2269 Mann Road	804-598-0250	www.ymcarichmond.org/powhatan/?gclid=CLDE2OSP5cYCFQ2PHwodakINJQ
Golf Facilities			
Fighting Creek Disc Golf Course	2270 Mann Road	804-598-5612	www.powhatandiscgolf.com
Foundry at Fire Creek	3225 Lee's Landing Road	804-598-9898	www.foundrygolfclub.com
Independence Golf Club	600 Founders Ridge Blvd	804-601-8602	www.independancegolfclub.com
Mill Quarter Plantation Golf Course	1525 Mill Quarter Road	804-598-4221	www.millquarter.com

11.13 WEDDING VENUES

Name	Address	Phone	Website
Belmead Mansion	5004 Cartersville Rd.	804-598-8938	www.francisemma.org
Fairview Farm	1660 Ballsville Road	804-492-4972	www.fairviewevents.com
Father Val Hall	2480 Batterson Road	804-389-2227	www.social-facilities.com
Independence Golf Club	600 Founders Bridge Blvd	804-601-8602	www.independencegolfclub.com
The Foundry Golf Club	3225 Lee's Landing Road	804-598-9898	www.foundrygolfclub.com
The Mill at Fine Creek	2434 Robert E. Lee Road	804-379-8211	www.themillatfinecreek.com

Appendix C

Tourism Inventory Map



Legend

- County Boundary
- ★ Virginia and National Register Sites
- ▲ Potentially Eligible as Virginia Landmark
- ◆ Critically Threatened/Ruins
- Potentially Eligible for Virginia Landmark (require further study)
- VA Scenic Byway



POWHATAN COUNTY MAP

Appendix D

SWOT Analysis

Powhatan SWOT Analysis:

Strengths:

- Availability of vacant land
- Excellent natural assets & recreational opportunities: two rivers
- State Park
- Good schools
- Proximity of nearby metro area
- No BPOL
- Population growth last 5 years (2000-2014 – 2.4%; 2000-2010 – 25.3%)
- Highest population density (compared to comparative communities)
- Visually appealing community
- Low crime
- Nice neighborhoods
- Average median age is fairly young
- Chamber of Commerce (active & involved)
- New residents coming in from other Virginia communities (6.6%) – only Orange was higher; from other states higher (1.9% -- higher than any other communities studied)
- Major roadway (Rt 60) traverses the County; access to Rt 288
- Strong sense of community; very family oriented
- Limited, but unique, tourism assets
- Fairly well-educated & experienced residents (more than 62% of job seekers have more than 10 yrs experience)
- Favorable land use taxation
- Some notable existing businesses (some diversity)
- Two power providers

Weaknesses:

- No direct interstate access (e.g. I-64 or I-95)
- Lack of direction from management for staff to focus more on solutions than problems
- Board is too political rather than being concerned with the overall good of the County – don't really represent the majority but, instead, only a small % of the constituents
- Where the Board is concerned, "it's their way or no way"
- Dysfunctional leadership on the Board of Supervisors
- Staff needs more training to better address current issues
- Lack of consistency in application of rules/regs (get conflicting messages/answers)

- Staff has “no sense of urgency” when working to resolve issues – poor customer service
- Level of services is weak compared to the cost (taxes)
- Arduous planning and zoning processes (12+ months)
- Proffers are very high
- No fast-track or expedited permitting processes
- Lack of incentives to businesses & developers
- Lack of broadband
- Land prices are higher than other communities
- Real estate taxes second highest of all localities studied
- M&T Tax – effective rate is in the top three highest of all comparative localities
- BTPP: Year 1 is one of the highest but more competitive after first year (fixed in Nelson at \$0.52/\$100 ALL years)
- Limited biz-related revenues streams (no meals or lodging tax)
- No small business assistance or help for entrepreneurs
- No identity – what is Powhatan?
- No existing industry/BRE program
- No lodging options for tourists & visitors
- Housing prices are high (median sale price - \$270K): no multi-family options
- Limited retail/shopping options but in the top three highest median HH income (only Goochland & Fauquier had higher MHH)
- Nearly 70% of residents leave the County for work
- No natural gas service available for commercial/industrial operations (none in Fluvanna or Nelson Co either)
- Agricultural activities are extremely limited – no related operations either (flash freezing, canning, warehousing/distrib, cold storage)
- Limited water/wastewater service areas
- No “connection” between community assets
- No marketing/promotion of Powhatan
- Restrictive/conflicting zoning ordinance requirements re: set-backs, etc
- Highest percentage of 18-64 year olds of all communities studied (65.3% -- bulk of the residents – 9273 falls into the 45-64 years old range)

Opportunities:

- Revisit tax structure and make adjustments to M&T and BTPP
- Consider adjustments to land use provisions
- Explore partnerships with VSU and private entities to build training and development opportunities geared towards “generational farming”
- Consider policy revisions regarding buffer requirements being shared between commercial/industrial and residential development
- Form-based Code – very effective for mixed-use developments

- Establishment of targeted industry program re: agricultural e.g. (similar to James City County Rural ED Program)
- Explore partnership opportunities with SBA and SBDC to create entrepreneurial training and business start-up programs (maybe even a biz incubator geared towards software development/tech companies) in the area, utilizing vacant commercial space.
- Establishment of a Technology Zone to encourage growth of software development sector
- Creation of a Food Hub & virtual hubs
- Work with Chamber to create a food/veggie festival; feature “guest chefs” from premier restaurants in Richmond & Charlottesville for preview nights
- Creation of combined Farming Incubator and Culinary Education Center – “Farm to Table Food Trail”
- Establishment of a formal BRE program – utilize volunteers from Chamber of Commerce; outsource program development and management
- Creation of ED & Tourism website – including relevant data
- Formal attraction program for Forestry industry: nearly 40% of Powhatan’s “land in farms by land use 2012” but only one company (ND) and 28 workers
- Breweries (hops, barley, other grains production) & craft distilleries
- More mixed-use developments with multi-family, age-restricted housing
- Senior and assisted living facilities – population aging in the next 5-10 years; nearly half of the total population is 45+
- Organize an annual “Orchid Festival” (nine greenhouses in Powhatan that are growing orchids – e.g. Chadwick & Son)
- Co-location of B&B’s and boutique hotels (i.e. niche “country inns” currently allowed) with horse farms
- Goat cheese and goats milk soap producers
- Imposition of lodging and meals taxes
- Signage improvements to help with wayfinding (and be less restrictive)
- Expansion of the Fiber Festival utilizing the Hemp Bill recently approved (partnering with VSU or VT)
- Creation of a Tourism Zone around BelMead (conference center & history center) – maybe incorporating areas near State Park
- Bike trail networks
- Star-gazing program
- Public/Private ventures (with EDA) geared towards tourism and agribusiness facilities
- Funding of alternative infrastructure systems to stimulate economic development activities (e.g. breweries)
- Norfolk-Southern Rail line
- Route 711 Village

Threats:

- Continued imbalance of existing tax base; reduction of County services & diminishing revenues
- Loss of current companies to neighbors (e.g. Amelia, Cumberland) who offer incentives and/or have access to Tobacco Funds
- Neighbors becoming more aggressive and/or mobilizing ED efforts (e.g. Louisa, Cumberland)
- Aging population – decreasing availability of workforce
- Housing cost and lack of “workforce housing”
- Limited entertainment options will not entice younger people (future workforce) to the area
- Limited medical and dental services
- Continued retail leakage
- No business-to-business services (e.g. Kinkos, FedEx, UPS Store)
- Loss of farm and agricultural land to housing

Appendix E

Stakeholder Feedback Summaries

Stakeholder Feedback Summaries:

FOCUS GROUPS: DEVELOPERS, COMMERCIAL REALTORS AND ENGINEERS

March 12, 2015

When you think of Powhatan County, what comes to mind?

- No population (not enough for commercial development)
- Good quality of life
- Rural character
- Sense of community
- Welcoming and friendly
- Transitional geography (between Richmond and Charlottesville)
- Business opportunities
- Lack of retail
- Uncertainty
- Bedroom community (expensive)—no affordable housing
- “Rurban” (rural with pockets of growth)
- Zoning if difficult
- Dealing with county officials
- Land prices too high
- What is County’s message?
- Tax rates too high for similar neighboring rural locality
- Kind, friendly, supportive, generous people
- Lacking density
- Loyal to local businesses
- Diversity of career fields
- Too spread out

Zoning Process

- “Every zoning takes years off my life”
- It takes a lot of effort to have any success
- County’s efforts have not materialized
- Inconsistency
- No continuity in political support
- Economic development function should be separate from zoning function
- “Mixed messages”
- Example re: Water and Sewer—Do they want to encourage development (or not)?

- Disconnect with high-density residential
- Does the county really want commercial development?
- New ordinances not yet tested so no one knows if it's better
- Current BOS is credited with vet clinic on Route 711, but not in designated area
- Good – very fast, especially as compared to other states such as CA and FL
- Bad – tough to know where you stand
- Hesitancy with staff to make decisions
- Commission and Board—not going to put all cards on table
- Disconnect between what County wants to be and actions taken
- Requirements and Fees: Proffers are high

Planning Commission

- Very open and willing to have conversations
- Willing to create solutions
- General lack of understanding of expectations
- “Unintended consequences” of holding on to rural character and CUP's (bank financing, etc.)
- CUP process is an additional “overlay” that creates a trickle-down effect over application requirements (example: apartments over garages are conditional)

County Staff

- Good to work with but the political side is an issue
- BOS negotiates with developers—they can be more flexible and agreeable
- Planning Commission needs to have more of a stake in the community
- Development community not representative of the overall community
- No flexibility – rates are very high (especially water and sewer)
- Depends on the person (some good, some bad)
- Usually you can get to the right person
- Some staff more responsive than others

Comprehensive Plan

- Residential: hasn't been much adherence to the old plan
- New Comp Plan: BOS has not been challenged yet since new Comp Plan was adopted, but handling of Luck Stone has sent a bad message to others
- Village residential allows for eight units per acre
- Transportation plan is not addressed in Comp Plan
- No plans for parallel roads
- Need another north/south connector road

Submittal Requirements

- Not quite as rigid (good) as other localities, but generally see more requests/comments later in the process – can change other things already approved
- Payments and fees seem to be comparable
- Flexibility: very one-sided (what’s in it for the county?)
- Very long
- There should be a fast-track process for zoning
- County needs to consider an administrative process that determines if submittal is acceptable or not more quickly
- Disconnect/lack of interaction with VDOT, DCR and others re: requirements
- County lacking “experts” in many areas (i.e. storm water)
- Ordinance requirements: Setbacks can be excessive between uses; ordinance doesn’t define points of setback from roadway
- Most issues are with outside technical topics such as storm water and VSMP
- Access management issues are more challenging (except if compared to NOVA)

Signage

- Process is unclear for multi-tenant space and how to apply regulations
-

Site Plan/Plan of Development Review

- County has its own “Access Management Ordinance” but requirements exceed those of VDOT. An example is turn lane requirements which are restricting projects.
- There is a conflict between erosion control approvals versus land disturbance permits
- Setbacks and buffers are fairly comparable but landscaping is easier
- No administrative process for zoning approvals re: minor requests for variance
- No flexibility in requirements
- Difficult for staff to exercise discretion
- Staff are afraid to make a decision

County Staff

- Usually easy to get to; more helpful
- Requirements not as strict as other localities
- Administration process is pretty good
- Staff is pretty good
- “One stop shop”
- Staff understands the process

Approval Timeframes

- Not enough staff to offer “fast track” review
- Timing is okay, as long as review and approval times are in keeping with client expectations
- Timing is good unless technical issues arise, where staff knowledge is lacking

Site Plan Review Fees

- Comparable to other localities in the area
 - Higher fees would be tolerable if approval times improved
-

Building Inspections/Public Works

- Overall, it has been good
 - Lacking sense of urgency
 - Some flexibility
 - Client timeframe needs to be defined upfront and response time depends on workload
 - Timeliness and turnaround is good
-

Barriers to Entry

- Proffers
- Bonding requirements could be in the future for residential projects
- Connection fees (Eastern Route 60) are too high—same as Chesterfield County rates
- Lack of vision by Board of Supervisors
- Political uncertainty
- Uncertainty can lead to delays—added costs
- No high-speed internet/broadband
- Water capacity and service availability is limited

Perceptions

- Does Powhatan really want commercial development?
- Lack of incentives
- Not “business friendly” (e.g. signage requirements, “mom and pops” moving out, being “picked on”)
- Community and residents not open to growth or change, especially equine and horse groups
- More public education and awareness would be helpful—public input is encouraged
- Projects on Route 711—many were overturned by Board

- Architectural Review Board was abolished by BOS; was a good tool and did not add time to approvals
- Route 711 (Scenic By-way) is a negative
- You can't have it all (higher density, good quality of life, designated development zones and growth)
- Why undertake a project and spend the money if you are going to get shot down?

To improve opportunities for quality development projects, County leaders can:

- Offer incentives
- Clarify the vision and be consistent
- Take national party affiliations out of BOS actions (too partisan)
- Revive the EDA
- Create a separate ED office independent from community development director
- Define and stick to the comp plan
- "Step it up" RE: recreational and cultural opportunities
- Not attracting young people to the county
- Foster more employment opportunities

Future opportunities

- Expansion of fiber optics
- Poultry farms
- Manufacturing and distribution
- Route 288 and Route 711
- Pursuit of any large tracts of land near Route 288?
- Creating more high-density areas where people can congregate (similar to the Powhatan Courthouse area -- Eastern of Powhatan)
- Central park
- Shops and restaurants
- What about something like Newtown in James City County/Williamsburg?
- More residential growth in villages of Powhatan

Powhatan's Greatest Advantages

- Proximity to RIC
- No BPOL (gross receipts tax)
- Natural beauty
- Rural character
- Well-suited to "cottage industries"
- Price of retail sites compare favorably with nearby localities

- Real estate tax is low
- Nice quality of life
 - Comp Plan is appropriate for Powhatan
 - Location (to Capital One) is untapped
 - Route 711 Village area is a huge opportunity
 - Community events

Most Significant Challenges

- Special development costs are high (\$18-\$22/SF)
 - High-speed internet service
 - No “entry level” housing
 - Lack of product
 - The land price versus “developable” portion of property is a bad deal, due to County’s requirements (re: densities, setbacks, etc.)
-

FOCUS GROUPS: AGRIBUSINESS/TOURISM

March 12, 2015

Powhatan is...

- Less traffic/less retail (shopping centers have stopped)
- Agriculture
- Bedroom community – sending people to other localities for jobs
- New subdivisions
- Developed East of 522 / West of 522 is rural
- Farm land
- Not even on the map where agriculture is concerned

How do you define Economic Development?

- Increase of tax base by businesses
- Starting your own business
- Has to be complimentary to community
- Living within means, spending responsibly
- Bringing people to your community to visit and spend money, then leave

The County’s current policies and plans provide for:

- By-right uses that encourage agribusiness and tourism
- Availability of land

- Increased distances from other uses
- Too much land is being taken away with 10-acre requirements & other provisions of the Zoning Ordinance
- Allowances on 2-acre lots create other concerns/issues that hurt the agricultural industry
- Distinct difference between “rural” and “agriculture”

Are there any impediments to adaptive reuse of farm buildings or creating new rural activities?

- Buffer requirements and setbacks (especially for large farm operations)
- Limits on number of animals
- Proximity of State prison and their own agriculture activities
- Broadband service is terrible – not available throughout the County
- Lack of understanding and knowledge re: value of agriculture to the County
- No lodging options in the County
- County is no help with Farmers Market

What are the primary attractions drawing visitors to Powhatan County today?

- Attractors are: wine festival, state park, historic sites, James & Appomattox rivers, soccer/baseball fields, Fiber Festival, Trail Run, horse shows, bike tour, Farmers Market, BelMeade, star-gazing
- Public schools are great: band participating in regional events
- Favorable land use taxation

Where are current visitors coming from and what do you know about them?

- Great activities and programs available, but visitors have nowhere to stay in the County

New Opportunities:

- Nick Nordan: USDA Energy Loan to make own energy on farm; program for veterans (“Armed to Farm”); working with JTCC on solar energy technician program – apprenticeship
- More horse-related activities (e.g. horse trails in the State Park)
- Agri-complex
- Tourism “destination” offerings
- Expansion of Ag-based programs in County schools
- Cycling activities (can also be an impediment due to traffic issues)
- Campaign similar to “Victory Gardens”

Powhatan in 5 years:

- Overpopulated - need more sheriffs, more roads
 - Purveyor of quality foods
 - Subdivisions going back to agricultural land
 - Two different types of agriculture: “real farmers” (need more than 10 acres to make a living) and “hobby farmers”
-

COMMUNITY MEETINGS**March 19 & March 24, 2015****Economic Development is...**

- Complementary businesses (to the County’s vision and desires)
- A “sell”
- Healthy or unhealthy
- Money coming into the County
- Necessary

Question 1: How would you rate the job being done by the Board of Supervisors?

- Their way or no way
- Don’t really represent the majority (only about 10% of the voters/constituents)
- Dysfunctional
- Minds already made up
- Some districts more responsive than others
- Lack of trust and respect
- Struggle to find balance
- Too much partisan politics
- Get conflicting messages
- Transparency
- Don’t always make decisions on what is best for the County
- Could do better – be more cooperative

Question 2: Are you satisfied with the services provided by Powhatan County?

- Don’t get many services for the money, comparatively speaking
- Schools are becoming a bigger “attractor”
- Trash/convenience center (only one here)
- Quality is decent because of the people involved (county is facilitating the services)

Question 3: What do you think are the County's greatest assets for attracting businesses to the community?

- Major roadway traversing the County
- Good quality of life
- Recreation and natural assets
- State Park
- Two rivers
- Pretty good schools
- Low crime
- Vacant land
- Chamber of Commerce

Question 4: What do you think are the County's biggest challenges to attracting businesses to the community?

- Lack of internet and broadband
- Limited road and transportation system
- No "workforce" housing
- Arduous planning and zoning processes
- Dissonance of Board of Supervisors
- No fast track/expediting process
- No sense of urgency, particularly with Planning/Review staff
- Fee structure—water and sewer too high (compared to Chesterfield)
- Lack of incentives

Question 5: Do you have any specific concerns about the County trying to grow its business base?

- More traffic on Route 60
- Status and "reality" of a parallel road
- How will possibilities "mesh" with community vision and character?
- Loss of farms—how to create opportunities to the west (Route 522) where water and sewer aren't required
- Where can businesses and visitors be served from re: lodging/accommodations; hotels and B&Bs needed

Question 6: What types of development projects are you willing to support (e.g. residential, retail, office)?

- Higher density
- Some multi-family options
- Mixed-use/village development (north/southeast quadrants)
- Route 522 and Route 60

- Distribution and office warehouse
- Projects that provide better-paying jobs

Question 7: Are there any types of businesses or development projects that you don't want to see in Powhatan?

- Strip malls
- Motor bike parks
- Workforce/high-density housing

Question 8: What types of companies would be of most interest and benefit to you?

- Specialty foods and grocers
- Niche industries that “make an impact”—clean, unique, exceptional in their fields
- Wineries and breweries to take advantage of agriculture
- Technology companies (that can bring and require broadband to the County)

Appendix F

Company Profiles & Team Members

Company Profiles & Team Members:

The work completed to produce the Powhatan County Economic Development Strategic Plan was the result of a joint venture between **Spectrum Growth Solutions LLC and Bowman Consulting**, operating under the unified banner of Spectrum Growth Solutions. The team members participating in this project, their respective roles, and the partnering company profiles are presented below.

Spectrum Growth Solutions LLC is a woman-owned, limited liability company specializing in economic development consulting and advisory services. With a primary goal of helping communities enhance their opportunities for sustainable growth and job creation, Spectrum offers a wide array of services including market research and comparative analysis, business park and infrastructure development, business plan modeling, marketing strategies, economic impact analysis, and organizational/community positioning. Established in January 2012 and based in Richmond, VA, Spectrum offers a team of proven, highly-qualified, and knowledgeable professionals, including practitioners with direct experience in economic development and tourism at the state, regional, and local levels. More importantly, Spectrum's work with many of Virginia's smaller localities provides a valuable perspective and understanding of both the unique challenges and opportunities in rural communities.

Bowman Consulting provides civil engineering, planning, surveying, environmental, landscape architecture, pipeline design, water/wastewater engineering, and transportation services to a variety of public and private markets throughout the United States. It also offers particular expertise in zoning, economic development and in land development/building regulations at the local, state and federal levels. The work of the firm includes commercial, industrial, educational, residential, retail, health care, recreational, utility, municipal, and federal projects. Bowman Consulting is headquartered just west of Washington, D.C. in Chantilly, Virginia, with a number of offices scattered around the Commonwealth including Richmond and Williamsburg.

Spectrum-Bowman Team Members Participating in the Project:

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